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THE UNIVERSITY OF ALBERTA

EDUCATIONAL PLANNING IN ALBERTA:
A CASE STUDY

by

© SEN KEOYOTE

A THESIS

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EDMONTON, ALBERTA

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THE UNIVERSITY OF ALBERTA

FACULTY OF GRADUATE STUDIES AND RESEARCH

The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research, for acceptance, a thesis entitled "Educational Planning in Alberta: A Case Study" submitted by Sen Keoyote in partial fulfilment of the requirements for the degree of Doctor of Philosophy.

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ABSTRACT

This study was an investigation of educational planning in Alberta. It was focused on planning by the Department of Education and the Commission on Educational Planning. Machinery for evaluating professional and public reactions to the recommendations of this Commission together with the substance of some of these and other reactions were examined.

The study was designed as a descriptive analysis of approaches to educational planning within the limits stated in paragraph one above. The ultimate purpose was to reach conclusions about present and implications for future planning in Alberta.

With one exception, the data were collected by interviewing persons associated with the two bodies already mentioned and with the Cabinet Committee on Education. In most cases interviews were augmented by documentation.

Educational planning at the Department of Education has had modest but not overly formalized structures and procedures. In the main, planning involved departmental employees and advisory committees. The Department had an identifiable component, the Directors' Council, which played a major role in policy and program development. In general the planning procedures at the Department were innovation-oriented exemplifying five phases of the innovative process. The planning approach in general was

incremental and reactive with some trace of influence from social and manpower demands.

The Commission on Educational Planning, which operated between 1969-72, had its genesis in certain recommendations of the Royal Commission on Education (1959) and the initiative of the Social Credit Party in 1969. The responsibilities of the Commission on Educational Planning were to propose means to satisfy the future educational needs of Alberta and to suggest permanent mechanisms for educational planning. Its Board members were involved on three task forces and numerous projects. Submissions, hearings and conferences were part of their involvement. The work of the Commission was supported by research studies of the Human Resources Research Council and position papers of other individuals.

The Cabinet Committee on Education monitored and evaluated professional and public reactions to the recommendations by the above-mentioned Commission. Later it made decisions on behalf of the government with respect to these recommendations: to implement, reject or study further. The views of departmental personnel and of selected groups were analyzed to indicate agreement or disagreement with some of the recommendations.

The thesis includes a summary of structures and procedures for future planning in Alberta education and recommendations for related research.

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Chapter 1

THE PROBLEM

INTRODUCTION

Educational planning, particularly at national, state and/or provincial levels, has become increasingly important in most countries in the world. In the early sixties alone at least sixty countries became involved in educational planning [Hayward, 1964: p.83]. Contributions and motivation for widespread practice and interest in educational planning has come from the Organization for Economic Co-operation and Development through the Mediterranean Regional Project and the Educational Investment and Planning Programs. In the United States there have been planning designs of which the "Eight-State Project" was one of the more elaborate.

In Canada, educational planning has gained in acceptance over many years. Evidence of this is the institutionalization of planning in Quebec and the growing interest in other provinces as indicated by several conferences on planning in this country and Canadian participation in planning conferences in other countries. In Alberta, interest has been shown in educational planning for more than two decades. Recently hope became reality when a Commission on Educational Planning

was established.

Practices here and elsewhere indicate a likelihood that before long educational planning in Alberta will be permanently organized. In the light of this possibility, careful studies of the concept are imperative. Perhaps an examination of planning activities in this province is basic to the whole educational process.

PURPOSE OF THE STUDY

The purpose of this study was to describe and analyze educational planning activities at the provincial level in Alberta. This purpose was accomplished through three major areas of investigation.

The first area of investigation pertained to conditions outside of and prior to the establishment of the Alberta Commission on Educational Planning (CEP) in 1969. This involved a study of the planning structures and procedures in the Department of Education and an examination of factors leading to a reconsideration of educational planning in Alberta.

The second major question focused on the approach to educational planning taken by the CEP. This involved an inquiry into the nature, process, methodology, and

organization of planning which characterized the operation of the CEP.

The third main concern had to do with the process of evaluating and the substance of professional and public reactions to the report of the CEP. This involved a study of the operation of the Cabinet Committee on Education and initial reactions of senior staff of the Department of Education. In addition, although with a lesser degree of emphasis, reactions of selected organizations and groups were analyzed.

DELIMITATIONS

The study investigated educational planning in Alberta during the period 1960 to 1973 inclusive. It was delimited to the following:

1. The planning activities in the Alberta Department of Education during the period 1965-1972;

2. The educational conditions and factors which led to a reconsideration of educational planning in Alberta during the period 1960-1969;

3. The planning structures, procedures, and outcomes of the CEP during the period 1969-1972;

4. The machinery for evaluating professional

and public reactions to the CEP recommendations during the period June 1972 to March 1973;

5. The reactions of key personnel at the Department of Education to some of the CEP recommendations during the period June-October, 1972;

6. The reactions of selected groups to some of the CEP recommendations during the period June-October, 1972.

LIMITATIONS

Several factors appeared to be limitations to the study. First was the limited number of persons who were interviewed. The length of time these persons had for interviews imposed another limitation on the study. In some interviews it was impossible to check verbal information against documentary evidence. The reliability of data so gathered is susceptible to the effects of the interviewees' perceptions as well as to the interviewer's interpretation.

Another limiting factor was the unavailability of some official files and records, especially those which described the educational conditions prior to the inception of the CEP. The researcher relied solely on the memory of those who were interviewed. This, in turn,

imposed another limiting factor upon the study.

Another limiting factor was the reluctance of some key personnel of the Department of Education to express their views on some of the recommendations by the CEP. Finally, the study was limited by the responses of selected groups who chose to react to certain recommendations only.

SUBPROBLEMS

Within the scope of the three main concerns stated previously, the subproblems were delineated as follows:

Subproblems Pertaining to Conditions Outside the CEP.

1. What were the structures and procedures for educational planning at the Alberta Department of Education?

2. What were the nature and characteristics of the planning activities at the Alberta Department of Education?

3. What were some of the strengths and shortcomings of the mechanisms for planning at the Alberta Department of Education?

Subproblems Pertaining to Conditions Prior to the Inception of the CEP

4. What were some major factors which called for a reconsideration of educational planning in Alberta?

Subproblems Pertaining to the Planning Mechanisms of the CEP

5. What were the functions of the CEP?

6. What were the structure and procedure for planning of the CEP?

7. What were the major planning tasks of the CEP?

8. Who engaged in these tasks and in what manner?

9. What were some distinctive characteristics of the planning activities of the CEP?

Subproblems Pertaining to the CEP Outcomes

10. What were the final outcomes of the CEP?

11. What were the structures and procedures for educational planning recommended by the CEP?

Subproblems Pertaining to the Machinery for Assessing Reactions to the CEP Recommendations

12. What were the strategies used for informing the public and for arousing the public responsiveness?

13. How did the Cabinet Committee on Education operate in monitoring and evaluating responses to the CEP recommendations?

Subproblems Pertaining to Reactions to the CEP Recommendations?

14. What were the reactions of key personnel of the Department of Education to some of the CEP recommendations?

15. What were the reactions of selected groups and organizations to selected CEP recommendations?

JUSTIFICATION FOR THE STUDY

Consideration of the Practical Situation

Many nations to date, both developed and developing, have institutionalized educational planning to meet educational as well as social and economic purposes and needs. In recent years educational systems in Canada have become seriously interested in educational planning. Alberta in particular was serious enough to establish the Alberta Commission on Educational Planning (CEP) to examine existing problems, evaluate current practices, and recommend changes or solutions [Worth, 1970:62-68]. The present situation indicates growing pressure for institutionalization of planning. There is

a feeling that effective, integrated long-term planning cannot be conducted through existing institutions and procedures because of the irresponsiveness of educators, politicians, citizens, and others to long-term planning [Worth, 1970: p.67]. The challenge in this decade is "to provide new structures and new processes, as well as help, encouragement, and freedom for all to do the best they can". [Worth, 1970: p.68]. It is anticipated, therefore, that in the near future Alberta will make a provincial level planning unit an authorized agency for long-range educational efforts.

But Alberta has been cautious in implementing new ideas. It is not very likely that a full-fledged response to the future will be made until various aspects of educational planning are examined and evaluated. Neither is it likely that structures and procedures of educational planning will be borrowed from elsewhere. There is a warning that "in our haste we might import structures for planning and adopt techniques which are inappropriate for our situations and problems"[Miklos, 1971: pp. 1-2].

The present study examined the practice of educational planning in Alberta. It was designed to provide some descriptions and analyses of the structures and processes which had been employed for some time, and it

investigated the outcomes as well as some strengths and weaknesses of the system. Furthermore, it looked at some possible future developments in Alberta education together with suggestions concerning the institutionalizing of a planning concept or scheme appropriate for the province.

Consideration of Theory

The past decade has witnesses concerted effort by several organizations, national as well as international, in making contributions to educational planning as a new body of knowledge. The Organization for Economic Co-operation and Development (OECD) at the international level and the 'Eight-State Project' at the regional level, in Western United States, for example, have been working in this field. They have made their experiences known to others through an extensive bibliography of publications. These agencies may claim at least some of the credit for a rapid growth of the field in recent years.

In spite of all these attempts, educational planning at this stage appears to be no more than the "science of muddling through". It is still more art than science. Strategies of educational planning at this stage may be considered as a learning process. Because of the lack of a generally accepted theory, learning and sharing of experiences among educational systems is part

of the process.

Experiences in educational planning may come from systems which have fully implemented planning. However, one should not undermine the experience of a system that has just started to organize its planning endeavors. An analytical look at the experience of such a system may become helpful in understanding more about the nature of planning, at least from a practical point of view. An empirical study of the planning activities of a system that is going through a transition is a gain in theory. It helps society avoid making erroneous statements about planning such as those based on intuition and arm-chair thinking. A study of educational planning should contribute to some degree to the theory of planning.

DEFINITION OF TERMS

Many terms are used repeatedly in this study. They are tentatively defined below for clarification.

"Coordination" refers to the attempt of a system to include and harmonize the efforts of its components in order to satisfy a common need and to ensure the attainment of an overall goal. This will avoid overlap and duplication of efforts and lack of continuity.

The word "plan" refers to a prescribed or agreed set of actions or alternatives to attain a certain objective or set of objectives which are in harmony with a general goal.

The "planning activity" refers to a specified form of action in respect of defining problems, searching for alternatives, and proposing solutions to the problems. This may involve analyzing data, making projections, or predicting future demands and supplies, as well as formulating overall policies for the total system.

A "planning procedure" refers to a series of steps in the planning activity. This may be an established form of action to be followed by those engaged in planning. However, the planning procedure may differ from one activity to another.

The "planning process" refers to a complete sequence of actions which involves the development, adoption, and possibly implementation of a plan or set of plans.

A "planning structure" refers to the organization of those components of a system necessary to perform the planning activity or process.

"Planning mechanisms" refer to the instruments

and processes by which planning is carried out. This suggests a systematic arrangement of some components and their relationship or interaction designed to perform individual and yet interdependent functions or tasks. In effect, the term refers to the structure, procedure, and process of planning.

ORGANIZATION OF THE THESIS

This thesis consists of eight chapters. The first chapter deals with the problem, including the purpose of the study, delimitations, limitations, sub-problems, justification for the study, and definitions of terms. Chapter two includes a review of the literature to provide a background for the study. Chapter three explains the methodology of the study and develops a model to guide in the analysis of planning. Chapter four deals with educational planning at the Alberta Department of Education. Chapter five describes factors leading to a reconsideration for educational planning in Alberta and the approach to educational planning taken by the Alberta Commission on Educational Planning. Chapter six deals with the outcomes of the Alberta Commission on Educational Planning and the machinery for evaluation of responses to these outcomes. Chapter seven analyzes reactions to some of the recommendations by the Alberta Commission on

Educational Planning. The thesis concludes with chapter eight which deals with a summary of chapters four through seven, conclusions, implications, and suggestions for further research.

Chapter 2

A REVIEW OF THE LITERATURE

The focus of this chapter is planning as it applies specifically to education. The material represents an attempt to answer questions such as what planning is, how it is carried out, and what tools are used. It lays a background for an understanding of the present study and guides analyses of planning activities.

DEFINITION OF PLANNING

The present volume of the literature indicates a lack of consensus among writers about the concept of planning. In this section, definitions of planning by four writers are considered for comparison.

Ewing [1968] regards planning as an activity which is primarily characterized by rationality and utilization of knowledge about the effects of decisions on an organization. Emphasized also is a future orientation of planning. According to Ewing, planning is

> ... a method of guiding managers so that their decisions and actions affect the future of the organization in a consistent and rational manner, and in a way desired by top management [pp.17-18].

Friedmann gives significance to the evaluative characteristic of a built-in control system that governs

change within a social system. The control system assesses the performance of the subsystems and then informs the social system of that assessment. It then suggests what correction should be made and in what manner in order to maintain the social system in a steady state. Thus, the most primitive form of the planning process, in this conceptualization, may be thought of as the feedback component of the system. According to Friedmann, planning is

> ... the guidance of change within a social system. Specifically, this means a process of self-guidance that may involve promoting differential growth of subsystem components (secotrs), activating the transformation of system structure (political, economic, social), and maintaining systems boundaries during the course of change [Friedmann, 1967: p.227].

The most frequently cited definition of planning is the one given by Dror some years ago. According to him, planning is

> ... a process of preparing a set of decisions for action in the future, directed at achieving goals by optimal means [Dror, 1963:p.50].

This definition contains seven elements, namely: (1) a continuous activity; (2) preparing a set of decisions; (3) a matrix of interrelated and sequential decisions; (4) action; (5) future; (6) defined goals; and (7) optimal strategy for achieving goals [pp.50-52].

Miklos draws attention to the difficulty, although not the impossibility, of distinguishing planning from other activities such as decision-making and evaluation [Miklos and others, 1972:p.4]. He then suggests two elements that

may be helpful in identifying which activity is planning and which is not. The first element is the reference to rationality of means and ends. The second element is a future orientation -- of preparation for future events and efforts to influence the outcome of these events [p.5]. A composite definition proposed by Miklos has specifications which are cognizant of these two elements together with the self-regulating characteristic of planning [Miklos and others, 1972]. Here planning is considered to be one dimension of the total decision process within an organization, which comprises planning, policymaking, and administration. The planning aspect of the decision process involves:

(1) Identification and refinement of alternative goals;

(2) Development of alternative means for achieving selected goals;

(3) Identification of the most promising (most effective and efficient) means; ...

(4) Monitoring the extent to which goals have been achieved; and

(5) Revising, on the basis of information gained, means and possibly goals or targets [pp.6-7].

The definitions given by Ewing, Friedmann, Dror, and Miklos may be compared with one another in terms of what planning is, its orientation, the goals, the means and the outcomes.

First, in defining what planning is, all except

Ewing seem to conceptualize planning as a continuous process. Miklos is the only one who relates this to the total process of decision-making. Second, these definitions show some difference in the orientation of planning with respect to time, action and change. All except Ewing seem to agree that planning is a future-oriented activity. Dror explicitly defines planning as action-oriented, whereas Miklos includes both future and change in his definition. Third, there is a difference in statements of goals. Ewing becomes specific and elaborates on the goal of planning. Friedmann simply indicates change as the ultimate goal. Miklos emphasizes goal development as a process. Dror is not explicit in his statement of goal. Fourth, these definitions differ in the statement of means. On the one hand, Ewing does not mention particular means. On the other hand, Friedmann goes so far as to suggest means to accomplish change. Somewhere between, Dror mentions "optimal means" whereas Miklos recommends the process of identifying effective and efficient means. Finally, these writers differ in their conceptualization of the outcome of the planning activity. Miklos seems to allow the greatest degree of option in implementation of plans; Ewing ranks next. Friedmann and Dror conceived of planning as having rather rigid outcomes.

A definition of planning should relate to the elements included above; namely, what planning is, its orientation, the goals, the means, and the outcomes. For the purpose of this study, a composite definition is adopted. Planning is considered to be one aspect of the total decision-making process in an organization. It involves the identification and refinement of alternative goals directed towards future and change. It also involves the development, trial, assessment, and revision of alternative means to achieve alternative goals. The outcome of the planning process is a set of alternative goals and means.

SCOPE AND GOALS OF EDUCATIONAL PLANNING

It is explicit in the general definition of planning stated in the previous section that educational planning is a process directed toward a series of activities in preparation for future education. The five elements of the planning process specifically apply to educational planning as well.

Two different situations exist in educational planning [Anderson and Bowman, 1964:p.9]. First, educational planning may be treated as an adjunct of general economic planning; second, it may be treated in its own right. In the first case, educational planning constitutes an extension of manpower planning, reflecting production and employment

as the prime orientation and goal. This concept may be extended to a situation whereby the nature of the overall planning encompasses an integration of social and economic goals. The theoretical foundations of educational planning are then shared with those that underly social and economic planning. In the second case, educational planning is considered in its own right; that is, it is directed toward aims as manifold and complex as the functions of the educational system. As a result, other considerations (political, social and economic) become particular aspects of educational planning and do not necessarily have priority over other aims.

The second view of educational planning was more commonly held in the plans during the 1960's of the Mediterranean Regional Project countries and in Latin America. Such a view makes it necessary to consider educational matters within the broader framework of the overall social and economic development plan. The plan for educational development, therefore, consists of the determination of resources including personnel and physical facilities to be allocated to education during the overall plan period [Poignant, 1967: pp.36-40]. When educational planning takes place under a broad framework of social and economic planning, it becomes important that the educational planner or planners know the objectives and techniques of the master plan [Poignant, 1967: p.22]. However, it is strongly felt

that

> ... the effective educational planner ... should never, under any circumstances, assume that he must be subordinate and subject to the whim and fantasy of the general economic development planner [Harbison, 1967: p.22].

Many UNESCO experts seem to take the view that human resource development is the ultimate plan which involves all sectors of the country. Curle, for example, sees educational and manpower planning together with other forms of social planning as important elements of human resource development planning [Curle, 1969: p.20]. In this kind of planning the planners become less concerned with the values of education than with the broader social and economic objectives of the country's overall plans. In Curle's own words, the planner

> ... seeks the most effective and economical means of fulfilling such broad objectives through a balancing of plans for education and training, health, nutrition, and welfare ... [p.20].

Harbison, who also shares this view, states further that such planning should be related to national planning "which encompasses economic, cultural, social and political development in the building of national identity and integrity" [Harbison, 1967: p.25].

THE PLANNING PROCESS

Planning has been defined as a process which involves the selection of goals, development of alternatives means, monitoring for goal attainment, and revision of means and ends. Some features of the process are examined in more detail.

An important question about the planning process is whether or not it should encompass the implementation of plans. Curle [1969] examines the relationship between planning and implementation and identifies two distinctive approaches. The one approach maintains that the planner should have no responsibility for implementation. The other approach views the planner's responsibility for plan implementation as one of his numerous tasks.

In the first approach, the planner is thought of as a skilled specialist whose expertise is model building or benefit/cost analysis; therefore, he should not perform administrative tasks of education that belong to a generalist [Curle, 1969: p.24]. Anderson and Bowman [1964] are among those who believe in this approach. To them, implementation of plans is part of the total decision process, not an ingredient of the planning process [p.8]. The only relationship they see existing between planning and decision-making is that the implementation of prior plans or phases of plans provides continuous feedback of experience to

planning [p.6].

In the second approach, the planner is viewed as part of the bureaucratic structure which does much more than just produce plans [Curle, 1969: p.24]. The planning agency is likely to be involved in certain practical situations which fall beyond the mere intellectual exercise of constructing plans. Among several other things, it is likely to examine target projects, to study annual budgets, and to evaluate the progress of previous projects. The planner is then both an academician and a practitioner who cannot avoid activities which ensure implementation of plans [p.25]. Dror is among those who believe in this approach. Whereas excution of plans may be the responsibility of some other agencies, it is maintained that "planning that is effectively oriented to action cannot ignore the means by which plans may be implemented" [Dror, 1963: p.6].

In spite of some disagreement on the functions of the planner as discussed above, practical reasons lead to the inclusion of implementation in the planning process. Thus, it may be summarized that the planning process consists of three phases of activity -- development, adoption, and implementation of plans.

Another matter of concern is what may be called the components of the planning process. The process should be flexible enough to allow for a diversity of practice

among nations and states. Whatever form of planning may be applicable to a specific country, the process should have some common elements. In this regard, Lyons [1967] suggests five elements of the process; namely:

a) Diagnosis and appraisal of the existing educational system, its performance and main problems;

b) Determination of basic policies and the setting of basic directives, priorities, and targets for their achievement ... in view of the need to integrate educational development with the nation's economic and social development;

c) Translation of overall targets into specific educational programs, projects and social development plans ...;

d) Implementation of plans, programs and projects by action at the central, regional, and local levels, supported by annual budgets. ... Co-operation between public and private education and attention to non-formal as well as formal education are essential to this;

e) Evaluation and revision of plans in the light of achievements and new developments [p.67].

In short, the five elements of the planning process in sequential order are: identification of the needs of the system, determination of the goals of the system, development of plans to meet the goals, implementation of plans, and revision of plans. These five elements of the planning process are consistent with the definition of planning given earlier.

PLANNING TOOLS

A basic instrument in educational planning is statistical analysis. This is useful in bringing to light such problems as youth unemployment [Callaway, 1971], demographic aspects of planning [Chau, 1969], and the costing of educational plans [Vaizey and Chesswas, 1967].

Mathematical models have been used in many countries in Latin America for the development of plans. These models were applied to the planning of human resource development, which characteristically involves demographic analyses and the projections of manpower needs for the future [Davis, 1966].

In recent years there have been developed an increasing number of operations research and budgeting techniques for use in educational planning. There are such useful tools as the Program Evaluation and Review Technique (PERT) and Planning, Programming and Budgeting Systems (PPBS) including Planning, Programming, Budgeting and Evaluation Systems (PPBES) which are often regarded as planning approaches rather than planning tools.

The use of computer programs as planning tools has gained popularity in recent years. These programs are more or less simulation models which are helpful in administrative decision-making. An example of these is the Resource

Requirement Prediction Model(RRMP) which has been used in the United States for some time and has subsequently been tried in Alberta. This model permits calculation of the finance, facilities, and staff required for certain enrolments which are chosen by planners [Judy, 1970:pp.115-122].

APPROACHES TO EDUCATIONAL PLANNING

The approaches to educational planning vary widely according to the broader policy to be implemented. In general terms, an approach may be either qualitative or quantitative. Of late, four approaches fall into the quantitative category and three into the qualitative category. The former approaches include manpower planning, rate of return, social demand, and budget-managerial. The latter approaches include innovation, technological forecasting, and alternative futures. These approaches were completely examined by Ziegler [1970] and Miklos and others [1972]; they are partially discussed by several other writers including Woodhall [1970], Coombs [1970], Bowman [1969], and Parnes [1964].

Manpower Planning

This approach focuses on projection of manpower requirements for some future target date, signifying long-range planning. It involves estimating the required

addition of labor force with various occupational qualifications for each occupational category. Educational planning is seen as a preparation of human resources to meet the aspirations for economic development through increasing productivity and technical knowledge. While the logic of the manpower approach is convincing, several weaknesses can be found. Coombs [1970] argues that this approach has a number of flaws. First, it gives the educational planners only limited guidance as to what to do with primary education which is not considered to be related to the educational requirements of the labor force. Besides, where the attention of the studies is confined to high level manpower needs, there are no useful clues about the educational requirements of the vast majority of the middle level labor force. Second, the occupational classifications and manpower ratios as well as the corresponding educational qualifications are usually borrowed from developed economies and do not fit the realities of less developed countries. Such faulty assumptions may result in mis-preparation and over-preparation of the labor force. Third, there exists the impossibility of making reliable forecasts of manpower requirements far enough in the future to be of real value as a guide to the economy, because of some economic, technological, social, and other uncertainties. For the manpower approach to be useful, educational planners should pay attention to extreme gaps and imbalances that need

remedy. In spite of these flaws, Parnes [1964: pp.59-61] maintains that manpower forecasts are both necessary and possible for sound educational planning and for the proper structuring of educational expenditure, provided these forecasts are not purely unconditional, are related to the functional composition of employment, and are not extremely detailed.

Rate-of-Return

This approach applies to analysis of investments in the expansion of one or another level of education, or type of curriculum. The focus is on the comparison of benefits with costs for one versus another investment or of such investment versus other uses of resources. The technique for measuring the return to education generally involves the comparison of the lifetime earning of persons with differing educational attainments and the difference is expressed as an annual percentage rate of return on the costs involved in obtaining the additional education.

Even though the approach has some appeal in eductional planning, it suffers from several difficulties as suggested by Parnes [1964:pp.53-54] and Coombs [1970: pp. 43-45]. For example, this approach does not measure the non-economic benefits of education to society. Also, the approach ignores the intercorrelations between education

and other factors which may be expected to have independent effects on income differentials. Moreover, so far it has provided no guides to the kinds of education on which expenditure would result in the highest rate of return.

Despite these difficulties, Coombs [1970:p.45] finds the rate-of-return approach to have a decided relevance and utility for educational planning. Its merit lies in that at least it emphasizes the constant need to examine alternatives and to weigh their costs and benefits before making a decision.

Social Demand

The term "social demand" is commonly used to signify the aggregate demand for education at a given place and time under the existing cultural, political, and economic situations. For the level of compulsory education, the approach simply involves demographic projections. For the level beyond compulsory education, the projections of enrolment take into account past trends, anticipated economic and cultural changes, and the like. This planning approach is characteristic of countries which have advanced economies.

Some shortcomings exist in this planning approach [Parnes, 1964: p.52 and Coombs, 1970: p. 40]. First, it ignores the broader problem of resource allocation at the

national level and assumes that education is the best investment. Second, it ignores the pattern of the manpower needs of the economy. Third, there is no attempt to find a balance between demand, costs, and resource allocation, thereby reducing the quality and effectiveness of educational investment. Fourth, it equates the aggregate of the individual needs with the social requirements. And finally, it ignores the fact that the demand for education is not entirely autonomous but dependent on overall policies.

However, from the political point of view, the social demand approach has some virtue in educational planning. For one thing, it satisfies the political dimension of needs. It also provides an incentive for the educational institution to find means whereby the gaps between the demand (enrolment) and the supply (seats) can be bridged.

Budget and Managerial

Bowman [1969: pp.667-668] refers to this approach as the linear programming model. This model is aimed at maximizing attainment of some objective function subject to linear constraints and certain discrete restrictions upon resource availabilities. The nature of the solution of such a function is some dual values. Essentially, linear programming is static and applicable to micro-analysis of investment. However, when it is applied to education, it

has been dynamic and of national scope. When projects involve a small part of an educational system, the benefit/cost method is used for analyses. However, when concern is with investment on a broader scale, it becomes necessary to introduce the manpower techniques together with the benefit/cost approach.

This approach may be viewed somewhat differently from the general task which is confronted in planning. The task is "to develop means for establishing priorities among goals and for managing programs designed to achieve selected goals in the most efficient manner possible" [Miklos and others, 1972: p.33]. Planning activities then become the application of management techniques -- such as systems analysis, cost-effectiveness studies, and Planning, Programming and Budgeting System -- to the educational system. Educational planning becomes more the preparation of strategic decisions in policy making than the preparation of overall plans.

It appears that the budget and managerial approach is not a pure model in itself. Whatever other model or models it makes use of, the difficulties found in these models apply to this approach as well. It is doubtful, therefore, whether the approach will provide useful guidelines for the efficiency of educational investment when this is done at the macro level. The approach might be of

some merit when it is applied to a particular educational institution. But at the macro level there exists a dilemma of the degree of autonomy of the individual units and of the coordination among them.

Innovation

This approach is conceptually a "form of planning through which an attempt is made to break with routine and habit by introducing new structures, ideas, methods or devices to solve problems in education" [Bourgette, 1972: p.48]. Innovation often arises out of some feeling of the inadequacy of or boredom with the existing circumstances, a fact which provides a basis for a search for a new goal or standard of performance. Theoretically, any given innovation may follow five major steps: (1) the definition of a situation as a problem, (2) the development, invention or discovery of a new policy or structure, (3) the implementation of the innovation on a trial basis, (4) the evaluation of the innovation in the light of expected results, and (5) the adoption of the innovation when it is favorable, or its rejection when unfavorable. (For further discussion see Ladoucer, 1969 and Ziegler, 1970).

Innovation as an educational planning approach is subject to certain criticisms, some of which have been given by Bourgette [1971:pp.11-14]. First, innovation tends

to define the problem very narrowly and with a limited range of alternatives. Second, the introduction of technical innovation tends to ignore the concern of people, thus showing a technocratic bias. Third, most innovative projects are subjected to individualistic bias, whereby situational and structural variables are overlooked. And finally, innovation has a very strong conceptual bias in terms of the way it views the future in that the educational future is perceived as in one way or another different from the educational past and thus as leading to an escape from past and present failures. Bourgette concludes that innovation in its existing form is not adequate for educational planning because of its narrow view of the future [p.14].

Technological Forecasting

This approach attempts to define the probable evolution of science and technology to guide most efficient and fruitful development. Methodology in technological forecasting, according to Rea [1969: p.203-233], should be developed in two areas:

> The first is an improved forecasting by making efforts to understand the process of technological advancement in greater detail -- to seek cause and effect relationships and mechnisms of scientific advancement and technology transfer. The second is in taking forecasts -- not in the form of a single speculation about what will happen, but in the form of different things that could happen if specified levels of resources were applied -- and incorporating them into resource allocation systems [p.232].

In the first area, the development of new and useful methods will be slow. In the second area, the resource allocation systems will provide meaningful advice to managers who are faced with alternative efforts.

A technological forecast is defined as "the prediction of ... likely scientific discovery that promises to serve some useful function" [Bourgette, 1972: p.52]. According to Bourgette in a review of the literature, two main types of forecasting -- one following the other -- can be distinguished. The first is exploratory forecasting which starts from the present and works into the future. The second is normative forecasting which examines future conditions and works backward to the present. Then four specific types of forecasts are defined as follows. Extrapolative forecasts are projections based on the assumption that the future is a logical extention of the past. Speculative forecasts are projections corresponding to anticipated wants, needs, and environmental forces. Explicative forecasts deal with the technological developments with respect to specific goals. Finally, correlative forecasts attempt to develop an internal consistency between a set of independent forecasts [Bourgette, 1972: pp.55-58].

According to Bourgette [1971: pp.23-24] technological forecasting has five weaknesses. First, it tends

to lead to no action. Second, it assumes that knowledge about something will automatically lead to intelligent action. Third, it tends to ignore people and their concerns. Fourth, it neglects the problem of planning and policy-making in a politically complex society. Finally, the approach tends to take a narrow view of the future as does the innovation approach.

Alternative Future

This planning approach is defined as an attempt "to concentrate on issues, values, and goals and to trace their quantitative and qualitative consequences back to the educational process" [Bourgette, 1972: p.62]. The main concern of this approach is in the societal future, rather than the future of technology. As a planning approach, it consists in

(1) tracing through the future consequences of current and foreseeable decisions; and

(2) multidimensional goal assessment and alternative strategy consideration [p.62].

In short, the approach attempts to relate non-educational factors in the future to educational planning in the present.

This approach is intended to overcome some of the weaknesses inherent in the other two qualitative approaches. It has a broader focus of alternative futures and is, therefore, less subject to the cultural, political, and economic

biases than the other two qualitative approaches. It is concerned with planning which defines the problem as being multifaceted and which takes place in a politically complicated society. Finally, the future of education is viewed as a range of possible alternatives in which educational goals are viewed as objectively as possible.

THE PLANNING UNIT

The five common elements of the planning process outlined by Lyons and as quoted in a previous section of this chapter suggest certain types of desirable personnel and the kind of training required by them. A fulltime planning unit is deemed necessary to carry out this process. The unit should comprise a team of the following personnel:

> A director of the unit, a generalist who possesses knowledge of both the technical and theoretical fundamentals of planning;
>
> A deputy director to help the director in administration of the unit;
>
> A statistician to handle data and their analyses;
>
> An economist to handle budgets;
>
> An architect or engineer to handle building design and utilization;
>
> One or more educational specialists to handle curriculum improvement and teacher training;
>
> A human resource planner [Lyons, 1967: p.67].

Assuming that a planning unit exists, the question of the efficacy of the planning process calls attention to the location of the unit. On the one extreme, educational planning may be incorporated into the framework of a broader planning bureau. Educational planning may gain from close collaboration with other areas of planning. The disadvantages are that the educational planning team may not be able to make full use of experience in the implementation of prior plans, and that proposed plans may not be readily accepted and properly implemented. On the other extreme, educational planning may be attached to a number of different government agencies or to various regional authorities. Then there is an advantage of a fruitful interaction between planning and implementation. The danger is that the practice may hamper a coherence of educational policies and the consistency between educational and other policies. The middle-way solution is to locate the unit at the Ministry of Education as Lyons [1967] suggests. The arguments about the location of educational planning put forth in this paragraph are developed in more detail by Eide [1964: pp.77-78].

Before an educational system opts for a particular type of the planning unit, it needs some ultimate decision based on certain considerations such as the definition of planning, the role of the planning unit, and the

relationship of educational planning to overall planning. For, as Miklos [1971] states:

> The general task which confronts those engaged in educational planning is to develop means for establishing priorities among goals and for managing programs designed to achieve selected goals in the most efficient manner possible [p.22].

When the role of the planning unit is to provide service and advice, the following guidelines may be helpful:

(1) To make the planning unit part of the organization it will serve.

(2) To provide service, not to exert prescriptive authority over other units.

(3) To assure that its relationship with other units is horizontal and that communication does not pass superior points of co-ordination.

(4) To assure that the product of its work normally provides input with the product finalized by other units.

(5) To assure that the planning unit is not used by the top leadership as a control mechanism over other units.

(6) To assure that the unit is not used to defend particular policies or practices [Eide, 1970: pp.23-24].

While it is dangerous to make a premature

conclusion that a planning unit is absolutely necessary for education at the provincial level, Miklos and Bourgette [Miklos and others, 1972: p.169] do provide a rationale for such a conclusion. They say:

> The creation of such planning units within provincial departments of education has decided advantages if coupled with greater sensitivity to the need for planning at all levels. In the interests of achieving both high levels of expertise at the technical level, as well as coordination of planning activities and effective use of information, a single planning unit would seem to be preferable to a more dispersed planning capability.

When such a unit exists in a provincial education structure, its chief functions consist of (1) monitoring the effect of existing policies, (2) preparing demand and development forecasts, (3) outlining the possible effect of changes, (4) analyzing costs and models, and (5) providing comprehensive information for policy review and implementation [Miklos and others, 1972: p.169].

It is debatable whether the role of the planning unit should be mainly of service and advice or of consistency control of new policies to be formulated. Nonetheless, there is common agreement that planning can become a forceful instrument toward changing policies in individual government divisions or departments. In this connection, the two aims of planning -- that of stimulating change and that of promoting consistency in policy -- can be integrated [Eide, 1964: p.73].

SUMMARY

Planning is defined as a dimension of the total decision-making process in an organization. It involves the identification of alternative goals directed towards future and change, and the development, assessment and revision of alternative means. The outcome of planning is a set of alternative goals and means.

Implementation of plans may or may not be thought of as a part of the planning process. For the purpose of this study, implementation of the plan is included in the process. The planning process then becomes one which involves identification of the needs of the system, determination of its goals, development of means to achieve those goals, implementation of plans, and revision of the means to achieve those goals.

In education, planning may subscribe to the goals of education and ignore all other goals. Or it may constitute some type of overall planning and thus share the goals of such planning. In the former case, educational planning is narrowly defined, whereas in the latter it is much broader in scope.

Many instruments are used as planning tools. Some examples include statistical analysis, mathematical models, operations research, budgeting techniques, and

computerized simulation programs.

Educational planning may be characterized by a number of quantitative and qualitative approaches. The quantitative approaches include manpower planning, rate of return, social demand, and budget-managerial planning. The qualitative approaches include innovation, technological forecasting, and alternative futures. These approaches are different in focus and methodology because they are designed to solve different problems under different situations. They also have their own strengths and shortcomings.

The last section of this chapter looks at the planning unit: its composition, location, and role. The composition of the unit is designed to make the planning process effective. The location of the unit ranges from one extreme to the other, each with certain advantages and disadvantages. The role of the unit may be either for policy control or for service and advice. While the location and the role of the educational planning unit are debatable, it would seem desirable to take the middle-way solution; that is, the unit should be located within the ministry of education and perform an integrated role.

Chapter 3

RESEARCH METHODOLOGY AND A MODEL FOR THE STUDY

This chapter describes the sources of data, the procedures for data collection, and the treatment of data. Two types of information formed the basis of this study: interviews and documents. These are explained in the sections that follow.

SOURCES AND NATURE OF DATA

Data for the study were obtained chiefly through interview. In some cases they were augmented by information in reports and publications. In general, there were six classes of data: namely, those pertaining to the Department of Education, those pertaining to conditions prior to the inception of the CEP, those pertaining to the CEP, those pertaining to the machinery for evaluation of responses, those pertaining to reactions of key personnel of the Department of Education, and those pertaining to the reactions of selected groups to the CEP recommendations. They are described below.

Data Pertaining to the Planning Activities of the Department of Education

Interviews were arranged with employees of the Department through Mr. D. Ewasiuk who acted as a coordinator and developed a schedule for interviews. Each of

these interviews lasted approximately one and one-half hours. The annual reports of the Department of Education for the years 1970, 1971 and 1972 were additional sources that rendered information about specific projects and programs. Other sources included an unpublished paper compiled in 1969 on functions and membership of advisory committees and boards of the Department.

Participating in the interview were nine departmental officials whose names appear in List C of the References. Interviewees, to some extent, were permitted to generate their own information. However, there were questions to which interviewees were asked to respond. These questions may be briefly summarized as follows:

1. What are the structures for planning activities in this Department?

2. What are the procedures for planning activities?

3. What are the characteristics of planning activities in this Department in terms of time orientation, participation, information, type of activity, underlying approach, and specific tools?

4. What are some strengths and shortcomings of planning structures and procedures used in this Department?

Data Pertaining to Conditions Prior to the Establishment of the CEP

The report of the Alberta Royal Commission on Education published in 1960 provided information on the need for educational planning together with suggested purposes, functions, and structure of the Royal Commission on Educational Planning that was recommended be established. Two interviews were arranged with Dr. H.T. Coutts, former Dean of the Faculty of Education, the University of Alberta, and Dr. T.C. Byrne, former Deputy Minister of the Alberta Department of Education. The interview with Dr. Coutts pertained to critical educational issues during the period 1965-69. The interview with Dr. Byrne was concerned with immediate factors that led to the establishment of the Alberta Commission on Educational Planning in 1969.

Data Pertaining to the Work of the Alberta Commission on Educational Planning

Interviews were arranged with the Commissioner and members of the Commission Board. Information was augmented by The Look-Out Function in Education: The Alberta Commission on Educational Planning an unpublished working paper of the Organization for Economic Co-operation and Development at the 1972 conference on planning. Some loose-leaf papers were available on program of activities, organization chart, and responsibilities of the Commission

Board members. A publication by the Council on School Administration entitled Challenge provided information about the operation of the CEP in the report of an interview with Dr. Worth in the fall of 1971. The final report of the Commission and several other papers such as the interim proposals of the task forces, research studies by the Alberta Human Resources Research Council and various position papers were additional sources of information for this part of the study.

Six members of the Commission Board were interviewed. As in the case with personnel of the Department of Education, these Board members were asked to respond to a set of questions; however, they were free to generate spontaneous information. The questions that were asked are summarized as follows:

1. On what basis were the members chosen?

2. What were the structures for the planning activities of the Commission?

3. What were the procedures for the planning activities of the Commission?

4. What were the members' responsibilities? How were these responsibilities carried out?

5. What were some significant activities of the Commission? How could these activities be described in terms of participation, time lines, techniques, and information?

Data Pertaining to Machinery for Evaluation of Responses to the CEP Recommendations

An interview was arranged with Mr. Larry T. Shorter, Secretary of the Cabinet Committee on Education. Information from the interview was augmented through access to a restricted paper for Committee members. Permission to quote from this paper was restricted to specific parts. Another two sources -- standard forms for correspondence as in Appendix D and an issue of the Alberta Hansard -- were also used.

Data Pertaining to Initial Reactions of Key Personnel of the Alberta Department of Education to the CEP Recommendations

In interviews with employees of the Department of Education, the interviewees were asked to react to some recommendations or sets of recommendations by the CEP. Each person spent approximately thirty minutes on these recommendations. The interviews included recommendations in the following areas:

1. Functions of basic education together with proposals on planned differentiation, rural education and

separate schools.

2. School year reorganization.

3. Governance of basic education including boards of trustees and school councils.

4. Reorganization of two Departments of Education with proposals on three common service units and a coordinating council.

Data Pertaining to Reactions of Selected Groups to the CEP Recommendations

Submissions of these groups were made available through the office of the Cabinet Committee on Education. The researcher was provided on-site working space at the office. Direct quotations by these groups were permitted for inclusion in this thesis. The first two groups included were the Alberta Teachers' Association (ATA) and the Alberta School Trustees' Association (ASTA). Selected from their submissions were reactions to the ten top-priority proposals in the CEP report. The other ten groups included such as Brentwood Home and School Association, Calgary Christian School Board and Civil Service Association of Alberta. Their reactions were concerned with the ten top-priority proposals and some other recommendations such as those on school councils and educational finance.

DATA COLLECTION

The process of data collection consisted of five phases, which overlapped with respect to time. The first phase involved the collection of data pertaining to the recommendations of the CEP and reactions to them. The second phase involved the collection of information about the planning activities of the Department of Education. The third phase involved the collection of data about the Alberta Commission on Educational Planning. The fourth phase involved the collection of information on issues, conditions and factors which led to a reconsideration of educational planning in Alberta and the inception of the CEP. The final phase involved the collection of information about the operation of the Cabinet Committee on Education. The total process covered the period from summer 1972 to spring 1973.

TREATMENT OF DATA

Most of the recorded interviews were transcribed verbatim; others were summarized. The transcriptions and

summaries were then categorized into sub-headings with reference to the subproblems delineated in Chapter One.

The researcher was on the alert for conflicting statements in the interviews, but none were apparent. Some documentary evidence supported in part the reports of the interviewees. Exceptions were the statements concerned with the reactions and departmental personnel to the CEP recommendations. These statements were subject to personal viewpoints.

The first draft of the thesis was submitted to the individuals who were interviewed and whose statements were quoted, directly or indirectly. Each of the interviewees quoted was contacted in writing. There were minor changes in their statements as endorsed for the purpose of the thesis.

Anonymity was maintained as much as possible in this report. Interviewees were given coded numbers which were not in alphabetical order. In three cases the names were used, and in one case the name was implied.

The analysis of the data was guided by an operational model described in the next section. However, the analysis did not attempt to incorporate all elements and all relationships between elements in the model. The model merely provided a general framework to guide the

analysis.

A MODEL FOR STUDYING EDUCATIONAL PLANNING IN ALBERTA

Figure 3.1 represents a framework within which educational planning in Alberta was conceptualized, analyzed and described in the thesis. Major components are identified as belonging to Past, Present and Future time.

Past

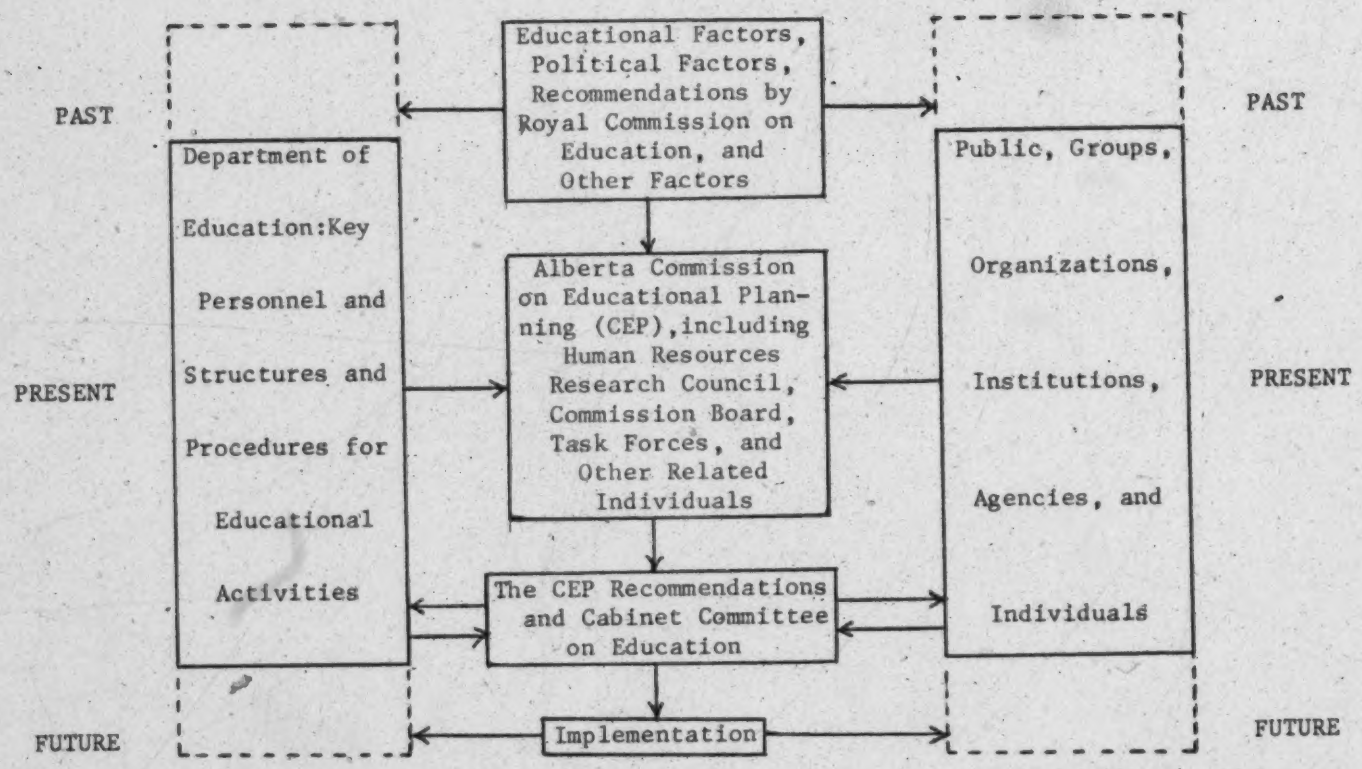
In Past time, there existed some educational and political factors that were influential for the educational system in Alberta. There were certain recommendations by the Royal Commission on Education (1959) that had some effect on educational planning in particular. Besides, other factors such as innovations and developments that occurred elsewhere became additional forces that exerted some impact on Alberta education. These factors taken together may have been powerful enough to create change at later stages.

Present

Several bodies are responsible for educational coordination and development in education. The Alberta Commission on Educational Planning was a principal agency which examined the future of education, identified future

Figure 3.1

A MODEL FOR STUDYING
EDUCATIONAL PLANNING IN ALBERTA


PAST
PRESENT
FUTURE
Educational Factors, Political Factors, Recommendations by Royal Commission on Education, and Other Factors
Department of Education: Key Personnel and Structures and Procedures for Educational Activities
Alberta Commission on Educational Planning (CEP), including Human Resources Research Council, Commission Board, Task Forces, and Other Related Individuals
The CEP Recommendations and Cabinet Committee on Education
Implementation
Public, Groups, Organizations, Institutions, Agencies, and Individuals
PAST
PRESENT
FUTURE

needs, developed alternatives to satisfy these needs within a broad framework, and made recommendations concerning these needs and alternatives. The inception and operation of the CEP was thought to have been influenced by certain factors in Past time. In its course of action, the Commission sought opinions of various bodies whose views were incorporated in the recommendations. Of course, conflicting ideas were compromised and synthesized from various sources such as research studies, task force reports, proposals by experts, and public submissions. Recommendations resulting from a synthesis of divergent and diverse views had to be submitted for verification by the sources that had been involved. The Commission was the main body making a new thrust for the future of the entire educational system.

The Department of Education was another government agency responsible for development and coordination of education. In particular, it was and is generally responsible for elementary and secondary education in Past time as well as Present time. It has personnel who develop structures and procedures for educational activities. The Department of Education is then viewed as another body that has a planning function for developments in education. Concurrently, it may have exerted certain influences on the work of the CEP. Also, the

Department of Education was influenced by some factors in the Past, not necessarily in the same manner that the CEP had been influenced.

The educational system in general and the CEP in particular have been influenced by the power of the public, some interest groups, certain organizations, most institutions, many agencies, and several individuals. These bodies become the main source of directives and reactions for the operation of the CEP at all phases. The CEP's final outcome -- the recommendations -- was also assessed by these bodies. Opposition and/or endorsement were incorporated into policy considerations by the Cabinet Committee on Education.

Future

The Future of education, as suggested by the CEP, was judged and decided by the government based on the assessment of the various bodies already mentioned, including the evaluation by the Cabinet Committee on Education. There is a wide range of possibility for change, from total change of the educational system to minor modification by implementation of a few fragmented recommendations. Whatever change made had certain effects on the Department of Education as well as on the public, interest groups, organizations and the like.

Thus, educational planning in Alberta has its Past, Present and Future. Its Past was associated with certain factors that became the basis of its Present. Similarly, its Present had seen the interaction of various bodies that shaped its Future.

The conceptual model described above is intended to provide a frame of reference for the description and analysis of planning in Alberta. The model identifies components significant for educational planning together with relationships among them. It helps the researcher present the description and analysis of these components and their relationships in logical order. This order is also placed with respect to time as suggested by the model.

This is not the only possible model for educational planning in Alberta. Other researchers may find some other conceptualization suitable to their purposes. In addition, there is no intention to include all elements and all relationships in the present study. Instead, the framework indicates the association of the elements and relationships under study with those that are excluded.

Chapter 4

EDUCATIONAL PLANNING AT THE ALBERTA DEPARTMENT OF EDUCATION

The Alberta Department of Education has been one of the principal agencies for the development and coordination of educational services in the Province. It is concerned mainly with elementary and secondary schools. The model presented in Chapter 3 shows the relationship of this Department exists among several bodies responsible for education. To understand educational planning in Alberta, it is imperative that the planning mechanisms of this Department be analyzed.

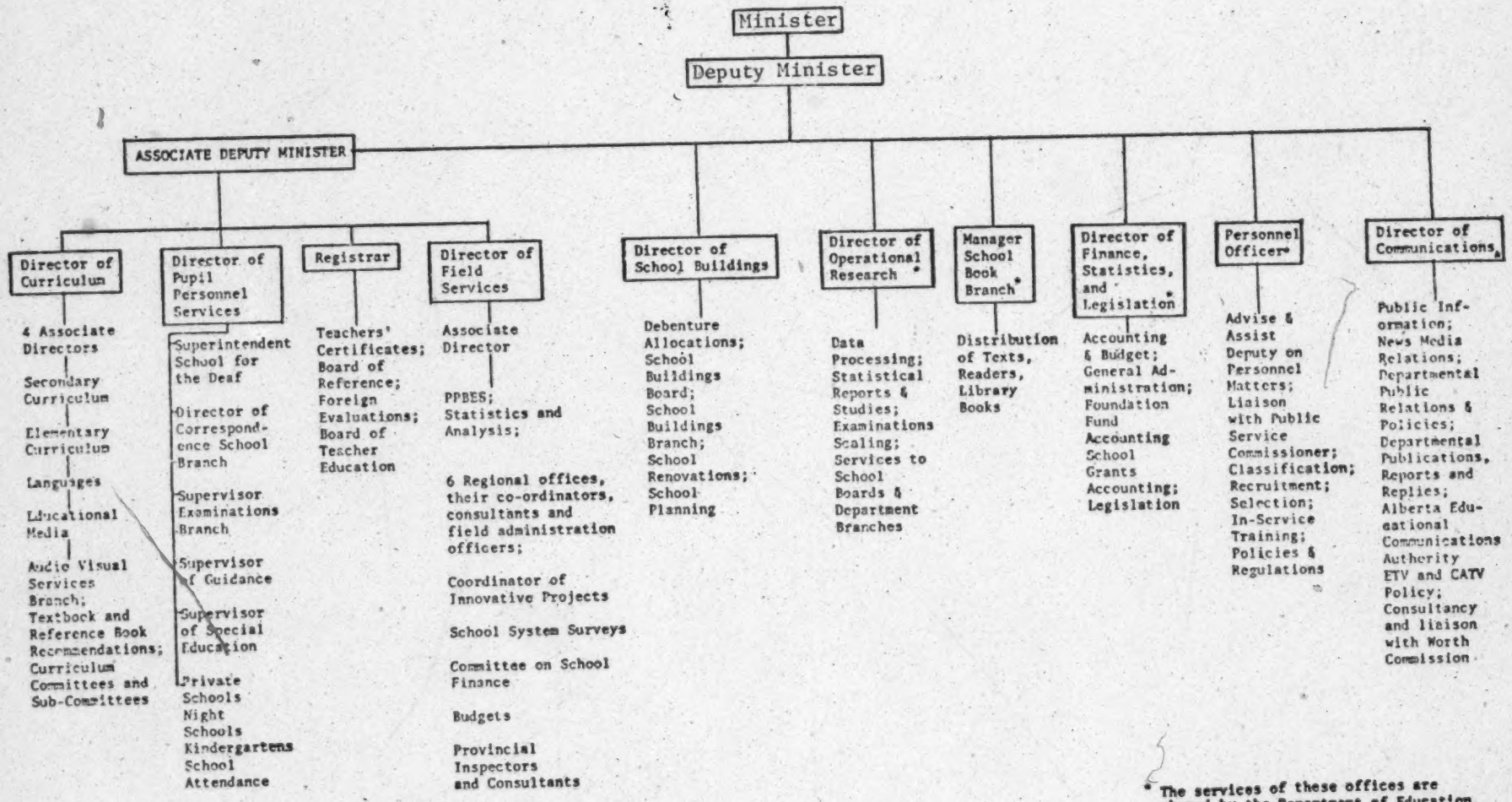
This chapter examines the planning aspects of the Department of Education, focusing particularly upon the structure, procedure, nature and characteristics of projects and plans. Some strengths and shortcomings of current practices in planning are also examined. The chapter concludes with a summary and discussion.

STRUCTURE AND GUIDELINES FOR PLANNING

The structure of the Department of Education in Alberta in 1971-72 is depicted in Figure 4.1. According to this chart, the Minister, who is a member of the Cabinet, is the political person responsible for the

Figure 4.1

ORGANIZATION OF THE ALBERTA DEPARTMENT OF EDUCATION


Minister
Deputy Minister
ASSOCIATE DEPUTY MINISTER
Director of Curriculum
4 Associate Directors
Secondary Curriculum
Elementary Curriculum
Languages
Educational Media
Audio Visual Services Branch; Textbook and Reference Book Recommendations; Curriculum Committees and Sub-Committees
Director of Pupil Personnel Services
Superintendent School for the Deaf
Director of Correspondence School Branch
Supervisor Examinations Branch
Supervisor of Guidance
Supervisor of Special Education
Private Schools
Night Schools
Kindergartens
School Attendance
Registrar
Teachers' Certificates; Board of Reference; Foreign Evaluations; Board of Teacher Education
Director of Field Services
Associate Director
PPBES; Statistics and Analysis;
6 Regional offices, their co-ordinators, consultants and field administration officers;
Coordinator of Innovative Projects
School System Surveys
Committee on School Finance
Budgets
Provincial Inspectors and Consultants
Director of School Buildings
Debenture Allocations; School Buildings Board; School Buildings Branch; School Renovations; School Planning
Director of Operational Research *
Data Processing; Statistical Reports & Studies; Examinations Scaling; Services to School Boards & Department Branches
Manager School Book Branch*
Distribution of Texts, Readers, Library Books
Director of Finance, Statistics, and Legislation *
Accounting & Budget; General Administration; Foundation Fund Accounting School Grants Accounting; Legislation
Personnel Officer*
Advise & Assist Deputy on Personnel Matters; Liaison with Public Service Commissioner; Classification; Recruitment; Selection; In-Service Training; Policies & Regulations
Director of Communications*
Public Information; News Media Relations; Departmental Public Relations & Policies; Departmental Publications, Reports and Replies; Alberta Educational Communications Authority ETV and CATV Policy; Consultancy and liaison with Worth Commission

* The services of these offices are shared by the Department of Education and the Department of Advanced Education

Source: Stringham and Ledgerwood, 1972

Department. Under him is the Deputy Minister, a civil servant at the top of the organizational hierarchy, who takes charge of the operation of the entire Department. The Associate Deputy Minister is a civil servant at the next lower rank who assists the Deputy in carrying out the functions of this Department. Directly under him are four branches: Curriculum, Pupil Personnel Services, Registrar, and Field Services all headed by Directors or the equivalent (Registrar). The remaining six branches, such as School Buildings and Operational Research, are responsible to the Deputy Minister. Five of these branches, as indicated by asterisks on the chart, report both to this Department and to the Department of Advanced Education.

An element in the structure which emerged within the Department of Education in 1968 was the Directors' Council, consisting of the heads of the branches of the Department (Stringham and Ledgerwood, 1972, p.7). This body held bi-monthly meetings. An interview with one official of the Department of Education revealed that the Directors' Council performs three functions [Interview B3]:

> (1) To facilitate access to the Minister for the Department via the Deputy Minister;
>
> (2) To coordinate the activities of all the branches of the Department; and
>
> (3) To make recommendations regarding policy changes.

Although the Directors' Council was not considered by most

officials of the department as a fullfledged planning body, the officials who composed it did maintain that it was involved in the planning activities of the department.

Interviews with personnel in the Department revealed several distinguishable levels of planning. Taking the views of these individuals together, there appeared to be five levels: political, departmental, divisional, branch, and program.

At the political level planning activities went on in the Cabinet or in the Cabinet Committee on Education which included the Minister of Education, the Minister of Advanced Education, and the Minister of Manpower and Labor. Such activities might result from the party platform [Interview B5]. This type of planning activity would probably be described by most students of planning as policy development. For the purpose of this study, it would include the establishment of educational priorities in the light of the overall goals of the provincial government.

At the departmental level, planning took place generally through the leadership of the Deputy Minister [Interview B9], and it could be described as being centered in the Directors' Council. While it appeared that there was no such thing as planning as a formal function spelled

out for the Council, there was little doubt among those interviewed that the activity of the Council did involve planning for future of education in Alberta.

> Few matters affecting future directions of the Department or of education in the Province proceeded from the Department to the Minister or the Government until receiving the approval of Directors' Council (Stringham and Ledgerwood, 1972:7).

At the branch level, there was some planning for matters of concern to the branch or matters which required concerted efforts of several branches. Obviously the Director of a branch together with a few other individuals in that branch were involved in this level of planning activity. Below this level, some interviewees tended to think that there was planning at the program level [Interview B9] which applied to specific sections or units within a branch. This would be particularly true for branches like Field Services because it contains discrete sections, such as Planning-Programming-Budgeting-Evaluation Systems (PPBES), Regional Offices, and Innovative Projects. Above this level, some interviewees tended to see planning taking place at the divisional level [Interview B7]; for example, in the Division of Instruction under the Associate Deputy Minister. According to one interviewee, this level of planning emerged in 1969 and has since then become very active. He described it as including

> ... a series of meetings discussing position papers directed toward first of all identifying a philosophy, secondly looking at the structure of the division, and thirdly looking at all the operational possibilities ...[Interview B7].

It was admitted that the breakdown of these planning levels was more arbitrary and conceptual than realistic. First, there were no formal planning groups which possessed characteristics that were described in the literature, although the Directors' Council, which was involved in planning for the Department, has some of these characteristics. Secondly, some of the activities which originated from a particular level might have involved some other level or levels at the planning stage. This second aspect will become clearer in a later section.

Assuming that there existed a structure of some kind for planning and that the planning activity existed in the Department, further examination was carried out to determine whether there were guidelines to assist in understanding what planning actions occurred in which level. Responses from the interviews varied and the generalizations which follow resulted from an attempt to find some common ground in the views expressed.

One of the general guidelines revealed during the interviews was concerned with the scope of planning [Interviews B5 and B7], which was defined by the terms of reference or the areas of responsibility. Such was the case

for the program, the branch, and the divisional levels. As for the departmental level, planning was concerned with issues of a broader scope, such as the interrelationship between branches. For example, the scope of planning for the Curriculum Branch was concerned with curriculum *per se*. An interviewee said

> We would choose to look at something in the Curriculum Branch more from a curriculum point of view than the legislative, the financial, or even the supervisory aspect of it [Interview B7].

After this the matter would go to the departmental level for considerations other than curriculum *per se*. Such considerations, as indicated in the interview, included financing and supervision of the curriculum. In general, then, the scope of concerns for planning became broader at the upper level and narrower or more specific at the lower level.

Another general guideline was concerned with time orientation. An interviewee suggested that

> Departmental planning is more of the long range type so that the policy arrived at may continue for a few years. As an example, budgeting runs to five years. At the branch level there is more short-term planning such as for one year at a time [Interview B2].

Although a difference in this time orientation seemed to exist between the two levels, it was submitted that there was some overlapping between them, particularly in debenture allocations which were done on a three-year

basis at the branch level [Interview B2].

A third general guideline was concerned with the nature of the issue dealt with, whether political or non-political [Interview B5]. If an issue was political, it would be considered in the cabinet, otherwise it would be considered within the department or at a lower level.

A fourth general guideline was concerned with the organization hierarchy [Interview B9]. The Minister is largely a politician and as a consequence plans and politices are considered by him in the political context. At the next level, the Deputy and the Associate Deputy Ministers are people who are responsible for the plans of the entire Department. They are then assisted by the Directors' Council which provides further information and ideas. At the next level are the Directors who have certain areas of responsibility such as curriculum, field services, and school buildings. At the lowest level -- the program level -- there are people who are responsible for recommending policies and planning in their own particular areas of competence, such as guidance and counselling and examination development [Interview B9].

The general guidelines that were submitted were not as helpful as they might have been in understanding the structure of planning in the Department of Education,

mainly because they did not indicate strongly what kind of planning occurred at various levels of the organization. Nevertheless they did point out the intertwining nature of the planning activity in the Department, and supported the notion that planning was not a formalized activity of the Department at any level.

PLANNING PROCEDURES AT THE DEPARTMENT

The preceding section was devoted to examining structure and guidelines for planning. Some attention was given to procedures, but only in a general way. The present section examines planning procedures in more detail.

Planning activity was described as comprising five phases -- initiation, feasibility consideration, procedural determination (or programming), field testing, and implementation -- although this is not in perfect congruence with the definition of planning activity given in Chapter 1. When these five phases are kept in mind, it becomes easier to analyze the planning procedure that was followed in the Department of Education.

The first difficulty that was encountered in identifying the five phases was locating the origin of ideas for initiation. It was stated during an interview

that

> ... the process is too subtle to point out in what directions the ideas flow. It is generally true that the person who is current and competent in his area and is forward-looking provides a thrust upward. Generally they keep bombarding us with ideas from their professional points of view ... At the same time I have myself initiated some changes. For example, I have seen a need for the modification of our examination system and the departmental examinations ... I like to think that I pioneered this idea of modification [Interview B9].

This assertion could be interpreted to mean that initiatives could come from any source, at any level, and from either an individual or a group. This conception seemed to be shared by many individuals who were interviewed [Interviews B5, B3, and B7].

Whether the initiation came from an individual or a group, from the top down or from the bottom up, from the Department of Education or from an external agency, it would generally find its way to the Directors' Council [Interview B3]. With respect to the role of the Directors' Coupcil in the planning procedure after the initiation stage, an interviewee had this to say:

> If the need or idea is internally conceived, the Director of the branch concerned has to be convinced that it is useful. Then he will probably take it to senior officials. Next we might want a broader discussion of it. This is where the Directors' Council comes in. If the Directors' Council decides that it was something that we thought we should proceed with, then it would likely go to the Minister [Interview B5].

The procedure described above generally applied to ideas

which were initiated within the Department. However, it is not beyond speculation that the same procedure applied to externally originated ideas as well.

The feasibility consideration phase is illustrated by the judgmental role of the Directors' Council. One of the officials interviewed described this role as follows:

> The Directors' Council gets involved in the higher and intermediate levels of planning. It is the place where ideas are bounced around. Someone may write to the Deputy Minister proposing a plan. The proposal will be presented to the Directors' Council who, together with the Deputy and the Associate Deputy Ministers, will listen carefully to the ideas, the objections, the possible limitations, the advantages and the disadvantages. The next stage will be that the Directors' Council may make recommendations itself or the matter may be left as it is at the discussion [Interview B9].

After feasibility consideration as described above, a matter would then go to the Minister for approval [Interview B5 and B9]. While it was generally true that issues went through the Directors' Council before they went to the Deputy Minister and finally to the Minister, it might well be that an issue was first submitted to the Minister for initial approval. An interviewee put it this way;

> Often though, at one stage in developing a plan, it is better to get the approval of the Minister in principle so that one doesn't do a great deal of work without any hope of it being rewarded [Interview B9].

An initial approval by the Minister then enabled the Directors' Council to proceed with the matter. There was a likelihood that the matter would be accepted at later stages.

After a matter had received the approval (in principle) of the Minister, it did not necessarily mean that procedural consideration would follow immediately. Two important constraints that could slow down the proceeding were limited financial and human resources. Some projects, such as Program Accounting and Budgeting (PAB), were developed slowly because they required relatively large amounts of financial support and specialized manpower skills. On these projects the government proceeded cautiously before making commitments. Other projects might be proceeded with immediately by incorporating them into the budget of the current year. In other instances it might be necessary to consider the projects within the budget of the following year [Interview B5].

When thought was being given to procedures, a person or group was asked to reconsider the problem. This reconsideration involved a delineation of subproblems in an effort to identify the dimensions of the major problem area. The task also involved gathering additional data and seeking further opinions on the matter. The final outcome was a set of alternative courses of action

[Interview B5]. In summary, procedural consideration involved three tasks: identifying subproblems, collecting additional data, and generating alternative courses of action.

The next stage after procedural consideration was the testing of alternatives. This was a necessary antecedent to implementation. In testing alternative courses of action:

> In the evaluative stages the alternatives might be tested by securing the opinions of knowledgeable people and by field services. When we start evaluating alternatives, three things may happen: (1) the alternative may be abandoned; (2) it may be recycled in an attempt to modify and make it operable; and (3) it may be found to be operable now. In the last instance implementation of the alternative could follow [Interview B5].

Implementation of the plan or project was generally carried out by a designated branch or section or even by the staff of a regional office. It was not too clear how a matter advanced from the trial stage or the procedural determination stage to implementation. It might well be that after detailed consideration by a branch or a group of individuals at the specialist level, the matter would go to the Directors' Council for some reaction before it subsequently went to the Minister for final decision.

NATURE AND CHARACTERISTICS OF PLANNING ACTIVITY AT THE DEPARTMENT

In the perception of some officials of the Department of Education, planning was an informal activity with no prescribed structure to separate the activity from other aspects of operation such as programming and evaluation. According to one official;

> Our planning procedure may be best described as a reactive model rather than a pro-active model with a grand design. A reactive model really looks at questions as they arise from a variety of sources. Planning here is in response to felt needs[Interview B5].

It was admitted that between 1970-72 there was no master plan through which certain projects flowed; neither was there a conscious effort to establish overall planning. Although the Directors' Council existed in the organization to coordinate the branches and to make recommendations regarding decisions to be made, planning was not an explicit function. It always happened that the initiation of plans, the generation of alternatives, and the implementation of plans became a shared responsibility of several bodies (not necessarily those at the top of the hierarchy), rather than the sole responsibility of the Directors' Council. In other words these activities shifted from one body to another.

Participation in the various activities of the Department associated with planning in its broadest sense

came also from individuals and groups outside the Department. Besides keeping up to date with research studies here and elsewhere, the Department personnel might sometimes invite people in to express their views concerning crucial issues. One of the avenues for encouraging a large number of fields to supply their views was the establishment of advisory committees. Perhaps without exception, every branch in the Department had a number of such committees to work with. A recent unpublished document from the Department showed seventeen committees and boards. Included were such bodies as the Advisory Board on Curriculum and Instruction, the Minister's Advisory Committee on School Finance, and the Advisory Board on Innovative Projects (Department of Education, 1971).

Generally these boards and committees had two functions. First, they were to react to proposed policies within the Department; secondly, they were to initiate and recommend policies. In an interview, it was stated that more often the reactive role seemed to be predominant over the initiative role [Interview B9].

These advisory boards and committees were trying to accommodate representation of interest groups in education, such as the Alberta Teachers' Association(ATA), the Alberta School Trustees' Association (ASTA), and the

Alberta Federation of Home and School Associations. They also sought representation from school boards, educational institutions, and other government departments. Such representation came, for example, from the University of Calgary, the Northern Alberta Institute of Technology (NAIT), the Edmonton Public School Board, and Department of Public Works.

About half of the advisory committees were ad hoc. Their contributions, therefore, were in specific areas during specific periods of time. The other half were permanent committees and had been involved in ongoing activities of the Department such as curriculum development.

It was noted that whereas inputs such as information, encouragement, suggestions, and proposals might come from a variety of sources or from several reference groups, final decisions -- particularly on adoption -- were usually made by the Minister [Interviews B3, B5, and B7].

There was no indication during interviews with Department officials that any deliberate efforts had been made tc identify the approach, or approaches, that should be followed to guide the planning activity in the Department. However, a typical answer to the question on the underlying approach for the planning endeavor revealed that planning was influenced by both social and manpower

demands. One interviewee said:

> In basic education our efforts are by and large geared to general education, grades one through nine. In years 10 to 12 we give special attention to a very small number of students who choose to become engaged in vocational education, at which time manpower demand becomes a factor in determining whether or not we should institute a program.
>
> The pressures from the economists are not strong in terms of manpower demand in this province, but they are great in terms of the provision of enough resources to carry on a basic education program [Interview B5].

Perhaps the approach of educational planning in the Alberta Department of Education could be summarized by this statement "... certainly social demand is an overriding approach modified by financial constraints" [Interview B9]. In other words, planning was justified by the needs of the society when the money required for support could be acquired.

The time of orientation of educational planning in the Department of Education depended upon the type of activity. In financial planning there was a move from a year-by-year process to three-year plans. According to an official, "It is probable that we shall now move to four-year planning with a somewhat detailed examination at the end of every two years" [Interview B3]. In curriculum development, including initiation, development, dissemination, and adoption, the period might range from two to five years [Interview B7]. For example, the new social studies

curriculum began with a conference in July, 1967, but it was not until the fall of 1972 that it became official for all grades to have the new social studies program [Interview B7]. In activities other than these, the time period involved did not seem to extend beyond one to three years.

EXAMPLES OF PROJECTS AND PLANS

To understand more fully the nature and characteristics of the planning activity in the Department of Education, the investigator looked at a number of plans and projects which had been carried out. These plans and projects are analyzed in this section in terms of what they were concerned with, who generated and developed them, the specific tools or techniques that were used, and the type of information on which they were based. The analysis might not be complete because some data were not available from the annual reports and from the interview.

Program Accounting and Budgeting

This was a pilot project that went through four stages of the innovative process -- development, field testing, evaluation, and adoption/rejection. The final decision on adoption or rejection for the entire educational system in Alberta resided in the provincial government. A publication of the Department reported that

decision had been made to require school systems to utilize Program Accounting and Budgeting (PAB) in 1974 (Government of Alberta, 1972: p.40).

The project was concerned with an experimental application of the Planning-Programming-Budgeting-Evaluation System (PPBES) to the financing of education. The idea for PPBES was generated by a previous Committee on School Finance and it had been of interest to the former Deputy Minister, Dr. Byrne. The details of the project were worked out by Dr. W. Duke who at that time was a graduate student. A project staff was employed which included in the early stages an econometrician and a consultant from Ontario [Interview B5].

Early Childhood Education

A two-year pilot project in education for disadvantaged children of preschool age was undertaken during the period 1970-1972. The project involved the Special Educational Services Branch for coordination of two centers in the Calgary and Edmonton public school districts. It also involved the Department of Health and Social Welfare at the feasibility stage [Interview B5], Educorps Limited for direction of the Inglewood Project, and the Human Resources Research Council for evaluation of the total project (Department of Education,1972:p.27). An interview indicated that it also involved community groups in Calgary

and the Calgary Public School Board [Interview B3]. Although it was not mentioned, the project underway in Edmonton might have had participation by similar groups.

School Year Modification

This was a study undertaken for the Department by Dr. Fenske on the divided school year and the possible use of schools on a year-round basis. The study involved consultation with the public through a conference in Red Deer. The Alberta Federation of Home and School Associations was a major group which did a survey of public opinion and which worked closely with the Department [Interview B3].

Intercultural Education

This represented a task-force approach to educational efforts in the Department. The task force was established by the Minister and required participation by personnel from the Directorates of Field Services, Special Services and Curriculum. (Government of Alberta, 1972:p.7). This force made a survey of the status of the education of Hutterite, Metis and Indian children, their educational aspirations, and steps that were taken on their behalf in other jurisdictions. The task force presented a report on these aspects together with some recommendations for appropriate action by the government.

The projects reviewed above were concerned with

the identification or experimentation of new alternatives in education. Involved in these endeavors were several individuals as well as groups such as advisory committees and Home and School Associations. Participation by consultants, such other government agencies as the Human Resources Research Council, and community groups was also included in one project or another. In addition, private organizations such as Educorps Limited were sometimes involved. Techniques in carrying out these projects appeared to be field trials of alternatives and surveys of public opinion or fact finding such as legal status and educational aspirations. These projects lasted one to three years -- a point which reinforces an earlier notion on the time orientation of planning activities in this Department.

SOME STRENGTHS AND SHORTCOMINGS OF THE MECHANISMS FOR PLANNING

The structure, procedure, and process of planning at the Department of Education were described in the preceding sections. Henceforward they are referred to as the mechanisms of planning. This section concerns itself with the strengths and shortcomings of these planning mechanisms.

Strengths

One strength of the existing mechanisms was

referred to as "a cooperative aspect" or "fluidity of the Directors' Council" [Interview B9]. This was explained as follows:

> Before you go too far down the road in planning, you get the reaction of other good minds, and you also see how it fits into the other areas of the Department. That is, we are able to plan coherently [Interview B9].

Coherence of plans as described here was attributed to the existence of the Directors' Council which consisted of Directors of the various branches and which carried out the functions of coordinating these branches as well as making recommendations or indicating reactions to proposed changes. In support of this, another interviewee stated that the Directors' Council helped to extend the scope and perspective of planning which originated in the branch [Interview B7].

A second strength of these mechanisms was a built-in evaluation component which "... helps at a particular point in time to decide whether this project should be implemented or not, and whether or not what has been implemented is satisfactory" [Interview B3]. This valuable component was claimed to be built into practically every project.

A third strength was the flexibility of the scheme and its responsiveness to each specific problem. In

this regard it was stated that:

> Our scheme is flexible in the sense that it responds to the social demand reasonably quickly, but not too quickly, so that the government has sufficient time to reflect whether it is real demand or just the demand of a minority pressure group [Interview B5].

Obviously, timeliness which was a characteristic of the mechanisms, was seen to be an asset.

A fourth strength of the planning mechanisms of the Department was the Minister's insistence that all possible alternatives be listed in recommending policies and plans. An interviewee said:

> He (the Minister) makes us look at all alternatives and choose those which we think are the best. That is, we are to develop a priority arrangement and to justify that arrangement too. This not only forces us to think ahead before other people react, but it also saves time when people up the line are considering it [Interview B9].

Shortcomings

An argument put forth by one interviewee was that whereas the prevailing mechanisms put planners close to problems and sources of information, an offsetting shortcoming was that "we are not far enough away to take a different perspective of the problems at hand" [Interview B5].

A second shortcoming of the practice was said to be the lack of research studies related to innovations being tried or adopted in this province. The opinion was expressed in this manner:

> We have difficulties in the field of evaluation of any alternatives, at least quantitatively. We rely to a large degree on judgment. We haven't been as conscious nor as sensitive to the need for evaluation as we ought to be. Our society does not seem to value social science research as much as it values research in other areas [Interview B5].

A third shortcoming had to do with the involvement of other government departments. It was felt that such involvement was lacking in a sufficient degree. It was also felt that education continued to be regarded as discrete and separate from other government enterprises or services. An example of this was the financing of education as discussed in this manner:

> When we talk about educational finance, we are really talking about a slice of the entire budget of the government. The previous educational policy placed restrictions on school boards in terms of their ability to make direct requisitions and to raise funds locally. At the same time it permitted municipal authorities a wide open field to the local taxpayers. That was unfortunate because mill rates kept climbing. [Interview B3].

This opinion seemed to indicate disappointment in the inability of education to compete with other services for a greater share of the budget. The practice of educational planning at the Department was thought to be associated with this problem.

A fourth shortcoming arose from the view that the Directors' Council was far from being adequate for the planning endeavor. An expression of concern went this way:

> Regarding the Directors' Council, some issues might remain unresolved merely because of two constraints. First, no clear directions come from the Directors' Council. That is, there is diffusion of opinions that does not allow for a clear focus. Secondly, there is the constraint of time. Often some of the issues may be given a summary kind of treatment, though they deserve more time. In the Directors' Council meeting some of the items on the agenda may be given more attention than others because of an emergency or because of the preference by the Deputy Minister. There is also a minor problem of communication in the Directors' Council because sometimes it happens that nobody knows for sure who is responsible for a certain item. Direction may be lost in the discussion [Interview B9].

SUMMARY AND DISCUSSION

This chapter examined the planning mechanisms of the Department of Education in Alberta, together with the advantages and disadvantages of these mechanisms as perceived by Department personnel. The findings are summarized in the following paragraphs.

The Structure of Planning

The organization of the Department of Education consisted of the Minister, the Deputy Minister, the Associate Deputy Minister in charge of the Division of Instruction, and the Directorates of ten branches. Emerging within this structure was the Directors' Council consisting of the Directorates that performed the functions of coordinating the activities of the branches and became involved in policy and program considerations.

The planning activity of the Department occurred at five levels -- political, departmental divisional, branch and program -- although these levels were not formally designated and the conceptualization of their existence varied according to the individual's perception.

A set of guidelines was suggested by the officials of the Department to help distinguish the levels of planning. These guidelines were concerned with the scope of planning, the time orientation, the political or non-political nature of the issue, and the relation of the issue to the organizational hierarchy. These general observations were not found too helpful in understanding fully the nature of the planning at each level. However, they reinforced the notion that planning in the Department was not a formalized activity.

The Procedure of Planning

The procedure of planning at the Department was described as comprising initiation, feasibility consideration, procedural determination, field testing, and implementation.

It was reported that ideas could be generated at any source both within and outside the Department, by individuals as well as by interested groups. The Directors' Council played a major role in feasibility consideration

and sometimes in procedural determination, though the latter was normally assigned to a specific branch or to a number of branches. After the feasibility discussion, and when the Directors' Council agreed to proceed, the matter was generally brought to the Minister for approval.

Procedural determination normally followed the Minister's approval, provided that the matter was not under excessive financial and human resources constraints. At this stage, the problem was redefined, more data gathered, alternatives developed and chosen. It was also a practice that alternatives be generated at the initiation stage. If that was the case, the most appropriate alternative was selected upon procedural consideration.

Field testing involved sounding out the opinion of the people concerned as well as actual trial in a real life situation in the form of an innovative project. Evaluation of experimental projects or opinion poll results could lead to the adoption or rejection of an idea.

The Nature and Characteristics of Planning

The planning procedure at the Department was described as being reactionary. There was no master plan that was designed as a source of minor plans and specific projects. As planning was not an explicit and formal function, the responsibility for planning was shared by

all individuals who held important positions or who had vested interests.

Participation in the planning activity of the Department came from major interest groups in Alberta as well as from individuals within and outside the province. The establishment of advisory committees and boards, nearly twenty in number, provided an avenue for input from major interests groups, educational institutions, school boards, and some other government departments.

The planning activity of the Department was influenced by considerations of the social demand approach modified by the manpower planning approach, although there was no deliberate effort to develop and subscribe to these approaches in a formal way.

The time orientation of educational planning in the Department was relatively short term -- one to three years. Curriculum planning was found to be an exception. The complete process could range from two to four years.

Some Strengths and Shortcomings of the Mechanisms for Planning

There appeared to be both strengths and weaknesses of the mechanisms for planning at the Department. Based on the perceptions of individual interviewees, some of the strengths and shortcomings were as follows:

Strengths: The existence and operation of the Directors' Council made it possible for the Department personnel to plan coherently and to extend the scope and perspective of the plan. A built-in evaluation procedure component was an additional strength. The scheme seemed to be sensitive enough for emerging problems without the danger of being oversensitive. Finally, the Minister's insistence that all proposals be accompanied by possible alternatives together with their strengths and weaknesses was seen to be an advantage.

Shortcomings: The belief was expressed that the Directors' Council was not adequate for planning because of two constraints: their inability to give clear directions and the supremacy of time over issues. Another weakness was the lack of research studies, particularly with respect to the evaluation of alternatives and innovations. The mechanisms tended to put the "planners" too close to the problems and information sources so that they were unable to take a different perspective on the problems. Finally, the lack of widespread participation by other government departments in the educational endeavor was cited as a shortcoming.

The analysis in this chapter applies to planning at the Department of Education during 1970 and 1972. By speculation, the planning structures and procedures during

1965 and 1969 could be somewhat different. The emergence of the Directors' Council and the division into two Departments in Education perhaps contributed to differences. However, the amount of difference could not be accurately assessed unless data were drawn from the period of 1965-1969. A general impression was that the degree of difference was not too marked. This led one to suspect that structures and procedures identified in the period 1970-1972 generally applied to the period 1965-1969 as well.

A notion that educational planning at the Department of Education was a non-formal function was strongly indicated by the interview. This meant that structures and processes were not designated by statues or legislation. As a consequence, it was difficult to distinguish planning from policymaking and routine administration in the Department. The emergence of the Directors' Council still did not bring into sharp focus the division between the three types of activities. As there was no statutory provision for planning, it became natural that the act of planning occurred at various levels of the organizational hierarchy. Planning, at various stages, involved different individuals of different capacities. In general, the person or group closest to the matter of decision was the one that became responsible for carrying out planning activities.

The procedures of planning at the Department of Education, as reported, showed a strong influence of the innovative process. An indication of this is adherence to the five phases of planning efforts: initiation, feasibility consideration, procedural determination, field testing, and implementation. A description of planning procedures was, therefore, centered around the innovative process. For the past few years the Department had been involved in several innovative projects, such as Program Accounting and Budgeting and Early Childhood Education. These projects were thought of as being undertaken in the manner described above. However, they should not be mistaken as a blueprint for planning activities at the Department.

A lack of master plans seemed to be associated with a lack of formal structures for planning. Related to these factors was the objective of planning which seemed to be obscurely based on the social and manpower demand approaches being claimed by Departmental personnel. The nature of planning activities, while leaving much to be desired, was augmented by participation of various interest groups (advisory committees and boards). These were participatory groups by Ministerial orders. They provided avenues for professional and public initiative and reaction on educational matters to reach the Department.

Departmental personnel indicated some strengths and shortcomings of their planning mechanisms. However, these were personal viewpoints and, as such, subject to individual perceptions and biases. What one individual thought as a strength might appear a shortcoming to another and vice versa. At this stage there are no criteria developed to judge these stated strengths and shortcomings.

As a point of departure, the next chapter examines the Alberta Commission on Educational Planning (CEP) together with factors that might have led to the inception of this Commission. Whereas the Department of Education was responsible for the development and coordination of elementary and secondary education; the CEP was concerned with the development and coordination of all levels of education. Attempt was made to analyze the operation of the CEP in the same manner that it was with the Department. The interest was directed toward the structures and procedures of planning used by the CEP. However, the analysis of planning activities would not be adequate without looking at other facets of the CEP's planning activities. These facets include outcomes of planning, planning mechanisms suggested for the province in coming years, and the monitoring of professional and public reactions to the recommendations of the CEP. Also,

the substance of reactions should not be overlooked, for they might provide an indication of what was happening in relation to planning. These are subjects of examination in subsequent chapters.

Chapter 5

THE ALBERTA COMMISSION ON EDUCATIONAL PLANNING

In Chapter 4 an examination was made of educational planning at the Department of Education during the period 1970-1972. Speculation was then made concerning planning in the period 1965-1969. The examination in that chapter, therefore, gave some indication of educational planning by the Department of Education for the period 1965-1972 at the elementary and secondary schools level.

Chapter 4 did not cover the totality of educational planning in Alberta. There were other bodies which were concerned with part or with all of the system of education from pre-school to post-secondary levels. One body which so functioned emerged in June 1969 and operated until June 1972. This chapter focuses upon this planning body called The Alberta Commission on Educational Planning (CEP).

A section in the last chapter indicated some shortcomings of the planning effort of the Department of Education. However, these shortcomings did not seem to be associated with the development of the CEP. There must have been some identifiable factors that led to the establishment of this planning body. Before investigating the operation of the CEP, factors leading to its inception

are examined.

FACTORS LEADING TO RECONSIDERATION OF EDUCATIONAL PLANNING IN ALBERTA

This section is focused on the identification of educational issues and developments that were matters of concern for Alberta during the period 1960-1969. Some of these issues and developments might indicate reason for the focus upon educational planning during the subsequent period.

In particular, this section is concerned with (1) the kinds of educational issues under discussion between 1965 and 1969; (2) the recommendations of the Alberta Royal Commission on Education, 1959 (the Cameron Commission); and (3) factors that led to the establishment of the Alberta Commission on Educational Planning, 1969 (the Worth Commission).

EDUCATIONAL ISSUES BETWEEN 1965-1969

In an interview with Dr. H.T. Coutts, former Dean of the Faculty of Education, the University of Alberta, he indicated that four major issues were under discussion during the period 1965-1969. These issues were associated with curriculum and instruction, educational finance, organization and structure, and centralization-

decentralization of control.

Issues Associated with Curriculum and Instruction

The first issue pertained to the function of education. Under criticism was the emphasis on the mastery of subject matter. It was felt that this emphasis unduly ignored the importance of the learner as an individual. Dr. Coutts said:

> There was a great deal of criticism that this was not really the important function of education. Far more important was a recognition of the individual, the rights of the individual, the personality of the individual.

The second issue was concerned with the bases of admission of students to post-secondary education institutions, particularly universities. The admission policy at that time was thought to be too restrictive. This policy resulted from an attitude which put emphasis on academic content and achievement. The criticism called for a removal of barriers to university educational opportunities by broadening the base of admission.

The third issue related to curriculum was the mode of instruction at the university level. The one element was the emphasis on research at the experse of teaching, and the other was the dominant role of the lecture as a method of teaching without increased use of instructional technology. Many critics expressed the view that teaching should be re-emphasized as a primary

function and that research should become a secondary role of the professor. It was also suggested that greater use of technology in teaching should be made than was currently done.

Issues Associated with Educational Finance

The rising cost of education during the sixties was so alarming that it became a major concern for the period 1965-69. Dr. Coutts had this to say:

> There was concern expressed by all sorts of people, particularly government people, that the costs of education were expanding at such a rate that the percentage of the tax dollar required to carry on the educational enterprise was growing our of all proportion to that portion of the tax dollar that was being spent on other social services and on necessary physical developments of the province. In one of his statements to me, Dr. Worth indicated that if the cost of education, particularly university education and secondary education, were to continue at the rate at which they were growing in the period prior to 1970 that by 1980 the percentage of tax dollar going into education would be so high that some of the other services would suffer.

Issues Pertaining to Organization and Structure

For many years there had been an expansion of vocational education in high schools. The momentum was carried forward to post-secondary education in the form of vocational colleges. Out of these developments there arose the problem of coordination of post-secondary education. There had been for some time the Universities Commission. With the expansion of community and vocational

colleges, the Colleges Commission was established. The two Commissions operated largely independently of each other. As a result, certain issues about post-secondary education could not be settled. For example, there existed the problem of student transfer from colleges to universities. The basic problem was apparently closely related to the organization and structure of post-secondary education.

Issues Associated with Centralization-Decentralization of Control

Dr. Coutts indicated in the interview that there was an issue related to the degree of centralization in education in matters such as curriculum development. There had been a persistent attempt to consolidate schools to form larger school communities. With this developed demands for more decentralization from the Department of Education to these educational communities or units. Dr. Coutts put it this way:

> I think that in the 1965-69 period there was a feeling that there should be more decentralization and that large school systems have more freedom, more independence, and more flexibility.

RECOMMENDATIONS OF THE CAMERON COMMISSION, 1959

The Alberta Royal Commission on Education, 1959 devoted a chapter of its report to recommendations on the

establishment of an Alberta Educational Planning Commission. The major recommendation toward the end of Chapter 33 reads as follows:

> RECOMMENDATION:
> 280. That a competent and authoritative body to be known as the Alberta Educational Planning Commission be established by Act of the Legislature at the earliest opportunity.
> (Alberta Royal Commission on Education, 1960:p.286).

In making this recommendation, the Commission had rationalized the need for a Royal Commission on educational planning and suggested the purposes and procedures for the activity of this planning body.

An early section in Chapter 33 of the report expressed concern over the acceleration of change in social and economic life as a result of industrial evolution. It pointed out that this change had startling implications for education and for survival of mankind. Education was shown to be valued by people all over the world as a key for survival and socio-economic mobility. The Commission, therefore, suggested that "... we establish some effective machinery for anticipating and accurately assessing educational needs substantially in advance of their occurrence" [p.283]. This machinery was meant to be a new overall planning and coordinating agency known as the Alberta Educational Planning Commission.

The purposes of this agency were suggested to be:

1. To give full time to the careful assessment and anticipation of educational needs in the broadest sense of the term.

2. To study, evaluate, and report upon new ideas methods, projects and developments which would have a bearing on the provision of educational facilities, their geographic location, and their relationship to existing or potential institutions.

3. To study continuously and to assess the coordination of educational resources, and to make recommendations as to the agencies which should carry out the program [p.284].

The Commission also proposed that this agency be a continuing Royal Commission, which would undertake particular activities in the manner specified below:

1. Conducting public hearings on specific problems.

2. Holding private consultations in fields of controversy on matters of educational need -- whether of program, plant or other facilities.

3. Either causing to be done, or itself sponsoring research in areas where insufficient evidence is available to formulate policy.

4. Studying and evaluating the provisions for special types of education (e.g., for the handicapped, the delinquent, the retarded); assessing needs for and reporting upon requirements for special types of vocational education, and making recommendations as to what agencies and where the work would be done.

5. Giving the public a continuous means of expressing their views and acting as a vital public relations agency for education. (This would involve either publishing or causing to be published or otherwise making available the most authoritative information on questions of public educational policy) [p.284].

The extent to which these recommendations were implemented is not too clear. Wilcer contended that the inception of the Alberta Commission on Educational Planning indicated the intent of Recommendation 280 being implemented in full [Wilcer, 1969: p.103]. One point seemed to be missing in his statement, that is, the Cameron Commission suggested a continuing Royal Commission. This together with what is said in a later section tends to weaken the above conclusion. However, Wilcer did point out some reactions to these recommendations. He indicated that there was resistance from departmental officials and lack of support from educational organizations and the public [Wilcer, 1969: p.99 and p.104]. He attributed the ten-year delay in the implementation of Recommendation 280 partially to these factors.

FACTORS LEADING TO THE ESTABLISHMENT OF THE COMMISSION ON EDUCATIONAL PLANNING

In a recent interview, Dr. T.C. Byrne, former Deputy Minister of Education, pointed out that the Commission on Educational Planning did not grow out of any concrete analyses of the needs for educational planning in the province. He indicated that the Commission was generated from a political campaign for party leadership within the Social Credit Party. He had this to say:

> The real reason for the Commission on Educational Planning grew out of the leadership campaign of Harry Strom of the Social Credit Party .... There were camps in the Cabinet and around Harry Strom there developed a group of young men; perhaps the most significant were Eric Schmidt, Donald Hamilton, and Owen Anderson. They conceived the idea that there ought to be a study on education similar to that which took place in Ontario.

The last mentioned reference was to the Hall-Dennis study on education in Ontario entitled Living and Learning [Ontario Department of Education, 1968]. Although the Hall-Dennis report was recognized as an authoritative document, it was not regarded as proposing new ideas useful to Alberta education. Therefore, while the report had inspired the young group in the Social Credit Party, it did not induce the Alberta Commission on Educational Planning to imitate its approach.

Dr. Byrne continued his description of events that led to the inception of the Commission on Educational Planning in this manner:

> When Harry Strom became Premier, Ray Rierson decided to resign from the education portfolio largely because he felt that he could not implement some of the things that Harry Strom had promised. Harry Strom persuaded Robert C. Clark to become Minister of Education. Robert Clark had been one of the campaign managers for Harry Strom, and he was very close to this young group of advisers.
>
> Robert Clark was young and perhaps a bit suspicious of bureaucrats at the Department. They were not the same kind as he had had at the Department of Culture, Youth and Recreation .... However, after a couple of weeks he began to have confidence in me as Deputy Minister largely

> because I was able to solve a very knotty problem .... It had to do with noon hour supervision in Grande Prairie .... I drew up a change in regulations which was accepted by all parties and the problem evaporated.
>
> Robert Clark discussed with me immediately after that a proposal to undertake a study on education. I talked to Eric Schmidt on the matter. We had a few meetings with Lorne Downey, and we discussed the idea with other people in the Department.

Out of these meetings there grew the view that a commission should be set up for educational planning, but that it should not do what the Hall-Dennis Commission had done. The directions for the Commission's undertaking as set out in the Order-in-Council were generated through Dr. Byrne's leadership. Two factors seemed to have played an important role in making his leadership a success. First, there was Dr. Byrne's professional and personal influence. This influence came from the fact that the newly-appointed Minister, Robert Clark, and his Deputy Minister had established mutual respect and confidence right from the beginning of their association. Timeliness could then be attributed to this factor. The second factor, which perhaps became more important than the first, was Dr. Byrne's own experience with and knowledge about an international organization for planning known as the Organization for Economic Cooperation and Development(OECD). Through his participation in several educational planning meetings of the OECD in Europe, Dr. Byrne had developed

some knowledge and understanding of educational planning. One of the events which highlighted his experience with the OECD and which perhaps had the most impressive influence in his thinking was the last meeting he had attended prior to Dr. Clark's appointment. The influence of this meeting was reflected in the guidelines contained in the terms of reference for the CEP. In this meeting, Dr. Byrne had this to say:

> The last meeting I had gone to was one in which the OECD central office decided to introduce some new ideas to this group (of economists) and brought together a group of futurologists: one from Stanford, one from Middle Haven, Connecticut, one from Norway, and another from England. This was one of the most exciting of meetings because all the futurologists were attempting to look ahead .... Perhaps it was my first perception of the idea that growth wasn't all that good. They weren't ecologists but they were attempting to discover whether or not there was developing in the western world a new set of values that was contrary to or inconsistent with that typical of current planning. They were challenging the wisdom of the economists.

Dr. Byrne's experience with the OECD had led him to think about the direction of educational planning. The first idea was that educational planning should be given a futuristic emphasis. The second idea was that educational planning ought to include "the totality of education," that is, education at all levels from pre-schooling to post-secondary education. The problem in establishing the commission was to secure a commissioner who entertained similar views and was able to undertake the necessary tasks in carrying out these objectives.

The involvement of Dr. Byrne and others in preparing the Order-in-Council was significant for the CEP's operation. Dr. Byrne indicated that in the writing of the Order-in-Council the ideas of the totality and futuristic emphasis in education underlay the whole theme. The terms of reference which incorporated these ideas provided the directions for the CEP's activities.

Perhaps it would seem incorrect to give credit for the new thrust in planning to Dr. Byrne alone. In the meetings which resulted in the recommendations for the ordering of the CEP in the direction which put emphasis on the future and on the totality of education, several persons were involved, such as L.W. Downey who held similar views to those of the Deputy Minister. The credit for the new thrust in planning should, therefore, be distributed among all these men.

Some of Dr. Byrne's observations might serve the purpose of summarizing factors leading to the inception of the CEP:

> If you made a study of educational commissions, you would find that very rarely is a commission of this sort proposed by the civil service. It is nearly always proposed by a politician who wants to do something. There is generally an element of social need, but by and large it is part of the political game: how can we develop something which indicates that our candidate is aware of the problems, wants to study them, wants to give leadership in their resolution, and wants to plan for change. These views are usually genuine but

commissions are really part of the political game. No civil servant really thinks that Royal Commissions are necessary because he thinks that the Department can do all that is required. I particularly thought that we ought to set up a planning structure within the Department of Education and we were moving in that direction perhaps slowly. But we were not able to do the kind of studies that the Commission could undertake. When the politicians said let's do a study, I saw this as an opportunity to get some of the things done that I thought were good to do.

SUMMARY AND DISCUSSION

Three main factors were identified as leading to a reconsideration of educational planning in Alberta. These factors also formed a thrust which eventually led to an establishment of the CEP.

Educational Issues Between 1965-69

Four major types of issues were under criticism during this period. The first type of issues centered around curriculum and instruction. There was dissatisfaction with the function of education which was emphasizing the mastery of subject matter without due recognition of the learner as an individual. Related to this issue was the criticism that the bases of student admission to post-secondary education were narrowly defined, and relied heavily upon academic achievement and thus allowed too small a percentage of students to enter universities. Another area of discontent stemmed from the dominant role

of the lecture as the mode of instruction accompanied by the inadequate use of technology in communication. Of general disappointment also was the emphasis on research rather than instruction at the university.

The second type of problem was the rising cost of education which was described as being at an alarming rate. It was felt that in a very short period education and other public services would reach a state of financial crisis.

The third type of issue pertained to the organization and structure of post-secondary education which showed a lack of coordination as among universities, colleges, and institutes of technology.

The fourth was the centralization versus decentralization issue in educational control. There was a demand for more decentralization from the Department of Education to local school jurisdictions.

Recommendations of the Cameron Commission. The report of the Alberta Commission on Education 1959 (the Cameron Commission) called for the establishment of a Royal Commission on Educational Planning. This report suggested certain purposes and procedures for the operation of the commission. In the main, the commission was to function as a continuing agency which identified the educational

needs of the province and determined and evaluated means by which these needs could be satisfied. The procedures were to include public hearings, research studies, need assessments, and the maintaining of dialogue with the public. However, it was doubtful whether or not these recommendations were the genesis of the inception of the Alberta Commission on Educational Planning which occurred a decade later.

Factors Leading to the Establishment of the CEP. The reason for considering a commission on education planning seemed to grow out of political policies within the Social Credit Party. As a coincidence, the Deputy Minister of Education by that time had had some experience with the operation of the OECD in educational planning in certain developed countries and was conversant with the idea of the future orientation to education planning. The terms of reference which were prepared by the Deputy Minister in consultation with a few other persons became the design for the operation of the Alberta Commission on Educational Planning.

It seems difficult to pinpoint what specific causes and factors had led to the establishment of the Alberta Commission on Educational Planning. On the one hand, the Wilcer study attributed the CEP establishment wholly to the recommendations of the previous Royal

Commission on Education. On the other hand, the former Deputy Minister refuted this conclusion by maintaining that the immediate cause was a political one. Being forced to draw conclusions, one would be inclined to think that the recommendations of the previous Royal Commission perhaps did provide some long-term effect on the rethinking of educational planning. These recommendations took a long time to materialize because of some resistance from departmental personnel and a lack of organizational as well as public support. Meanwhile, political and professional factors provided some short-term effects that led to the ordering of the CEP. All factors taken together became a thrust for a reconsideration of educational planning in this province.

This section provides a background for the development of the Alberta Commission on Educational Planning. The next section examines the structure and procedure for planning used by this Commission.

THE ALBERTA COMMISSION ON EDUCATIONAL PLANNING

The major focus of this section is the Alberta Commission on Educational Planning. To be described first are some general characteristics of the Commission. Following these statements are descriptions of specific aspects of the Commission which include the tasks, the

organizational structure, the personnel and their individual responsibilities, the design of the activities, and the procedures for the planning activities.

GENERAL CHARACTERISTICS

The Commission on Educational Planning had some general characteristics which made it entirely different from many other planning bodies. It was a Royal Commission typically founded on an ad hoc basis. It was similar to other Royal Commissions in the manner in which it carried out the tasks. That is, it engaged in many activities common to other Royal Commissions, such as investigation of current problems, evaluation of existing practices, and recommendation of changes in practices or of solutions to the problems [OECD, 1972: p.3].

But the Commission also differed in some respects from other Royal Commissions, particularly in orientation and scope. It focused upon educational planning rather than education per se. As a consequence, the orientation was mainly directed toward the future and not toward short-term changes or solutions. The effort of the Commission was in the direction of avoiding previous mistakes in education. Also included was the function of anticipating future problems and suggesting to the government new courses of action [OECD, 1972: p.3]. The Commission

concerned itself with all forms and all levels of education; the scope included education from kindergarten to university, formal as well as informal, and private as well as public.

Unlike most Royal Commissions, the Alberta Commission on Educational Planning had only one Commissioner. The Order-in-Council entitled him to recruit additional personnel. A small staff was hired for administrative and secretarial work, including a number of part-time, non-permanent persons. Before the CEP activities got under way, the Commissioner (1) recruited eight persons to comprise, along with himself, a Commission Board of nine members (although one person could not fulfill his assignment, (2) established three task forces with ten to twelve members each, and (3) arranged for appropriate support and research staff [OECD, 1972: p.3].

THE TASKS

The tasks of the Commission were designated by the terms of reference contained in the Order-in-Council Number 1126/69 dated June 24, 1969. An excerpt from the Qrder-in-Council reads as follows:

> In particular, but not to the exclusion of other matters, the terms of reference for the Commission on Educational Planning are as follows:
>
> (a) The Commission shall enquire into current social and economic trends within the Province to

determine the nature of Alberta society during the next two decades.

(b) The Commission shall examine the needs of individuals within that society, having regard to the changes that may occur.

(c) The Commission shall study the total educational organization inclusive of elementary and secondary schools, colleges, technical institutes, universities and adult educational programs to decide the necessary adaptations of these institutions to the trends and needs hereinbefore described.

(d) The Commission shall establish bases for the priority judgments of Government with respect to the course of public education in Alberta for the next decade.

(e) The Commission shall give such consideration to the financing of the total educational organization as is deemed essential to the establishment of priorities.

(f) The Commission shall enquire into and recommend on the appropriate permanent structures and processes for the administration and coordination of the total educational organization and for long-range educational planning.

(g) The Commission shall either undertake directly or request from the Human Resources Research Council the completion of studies relevant to achievement of its (the Commission's) purposes.

(h) The Commission shall enlist the aid of government officials, the teaching and administrative staff of elementary, secondary and post-secondary institutions, local school governments and citizens at large in undertaking this enquiry and shall involve, insofar as possible, Alberta citizens in the processes of the enquiry.

(i) The Commission shall establish an office and engage suitably qualified individuals and organizations to assist in the execution of the work.

(Order-in-Council 1126/69, June 24, 1969).

These terms of reference provided guidelines for the scope of the activities of the Commission and for the means through which its mandate might be accomplished. The mandate involved the period between 1970 and 1990 and included the following tasks:

(1) To project the nature of Alberta society and the needs of the individual during this period;

(2) To recommend on adaptations of the total educational system to meet the nature of the Alberta society and the needs of the individual during this period;

(3) To propose bases for priority establishments in the development of educational policies, including educational finance, during the first half of this period;

(4) To propose permanent structures and processes for administration, coordination, and long-range planning in education.

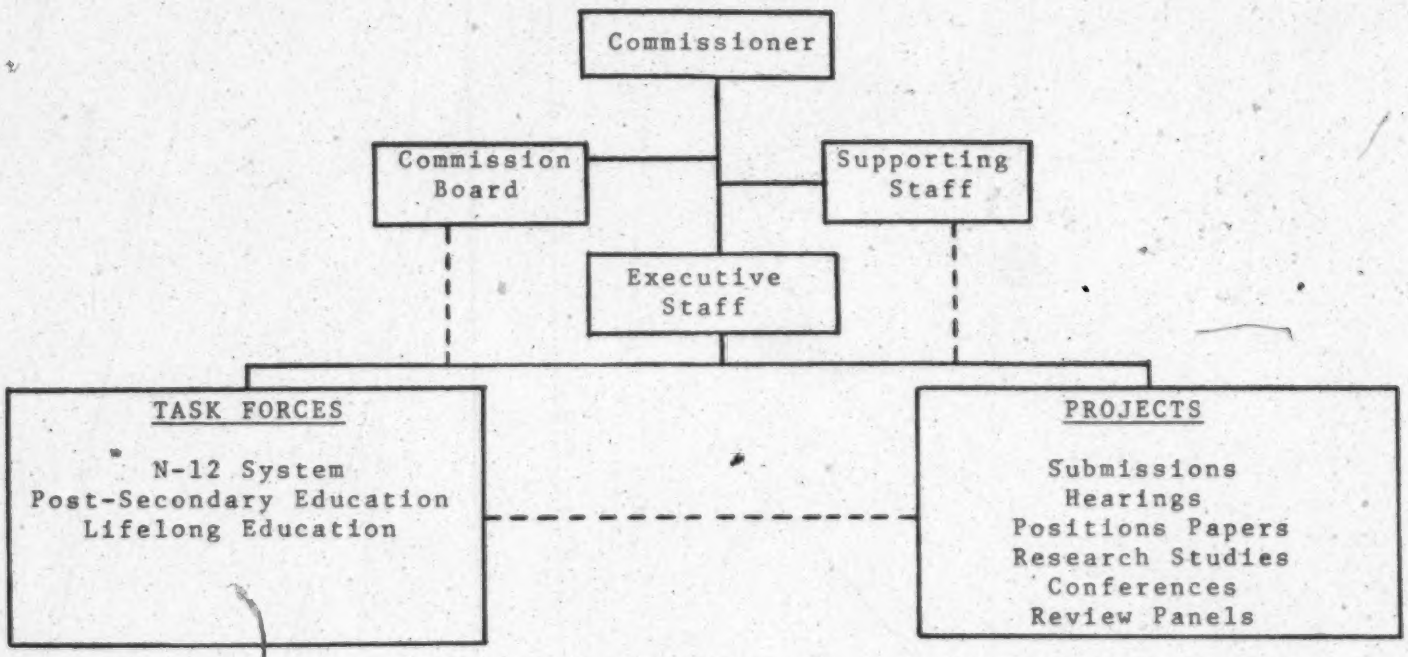
Although the Commission was to make recommendations applicable to the period 1970 to 1990, it took the liberty of extending the period to 2005.

THE ORGANIZATIONAL STRUCTURE

Figure 5.1 depicts the structure of the Alberta Commission on Educational Planning (CEP, Fifth Draft). The

FIGURE 5.1

ORGANIZATION CHART



Source: Alberta Commission on Educational Planning, 1969.

organization had six important elements: the Commissioner, the Commission Board, the Support Staff, the Executive Staff, the Task Forces, and the Projects' Staff. All of the other five components were directly responsible to the Commissioner.

Of the five components, two seemed to be self-explanatory: the Support Staff and the Executive Staff. They dealt with the internal operation of the Commission. The other three components were the main constituents that engaged in the Commission's enquiry. They are described in the sections which follow.

The Commission Board

In practice, the Commission Board consisted of seven members including the Commissioner. In general the members of the Board were involved in the following tasks:

(1) Defining policies and procedures.
(2) Coordinating activities.
(3) Analyzing information and proposals.
(4) Serving as a source of information, insight and criticism during the development of the Commission Report [OECD, 1972:p.9].

These tasks become more apparent in later

sections when other aspects of the Commission's functions are discussed or described. At this stage it is worth noting that the Commission Board as a group performed what could be termed a reactionary role in their relationships with the Commissioner. With respect to this role, the group acted as an advisory board to him by expressing their agreement or disagreement independently on the issues raised by him [Interview A6].

The Task Forces

This component of work of the Commission consisted of three task forces, (1) the N-12 System, (2) Post-Secondary Education, and (3) Lifelong Education. Each of these task forces was focused on two members of the Commission Board, the first known as the Coordinator and the second as the Associate Coordinator. These members in turn recruited other task force members to comprise a team of ten to twelve persons. Each of the task forces was charged with:

(1) ensuring in depth consideration of each of these levels or forms of education,

(2) examining and evaluating alternative futures for each level or form of education, and

(3) proposing guidelines for the development of each level or form of education in the target time period.

The responsibilities of these Task Forces were indicated in the preface of the task force reports (see, for example, the Lifelong Education Task Force Report).

The Projects

This component of the Commission's structure consisted mainly of the activities which were designed to gain information relevant to the mandate of the Commission as well as to convey the Commission's aims and concerns to the public. These activities included submissions, hearings, position papers, research studies, conferences and review panels.

Figure 5.1 indicates some linkages between the various components. The Commission Board, the Support Staff, and the Executive Staff maintained a staff relation with each other. There appeared to exist no significant line relation among them. The relation between the Commission Board and the Task Forces was not quite obvious. Although some members of the Board exerted leadership influence on the Task Forces, such influence involved motivating and coordinating rather than managing and directing. Finally, the Project part of the work of the Commission implied the existence of certain groups such as

professional organizations, community people and the Commission Board members themselves. The relationship of these groups could be called an interactive one.

THE PERSONNEL AND THE INDIVIDUAL RESPONSIBILITIES

This section focuses upon the Commission's personnel and their individual responsibilities. As the Commission Board members appeared to be a more visible component than the others, they deserved special attention.

Composition and Selection

Of the nine members of the Commission Board, there was a balance between professionals and non-professionals in education. Including the Commissioner and including a Board member who was not able to fulfill his duties, there were five professionals and four non-professionals [Challenge, 1972:p.20].

The reasons for employing these individuals on the Commission Board went beyond a matter of maintaining the balance of representation. The interviews with members of the Board revealed that there were some criteria for selecting them. These criteria were a mixture of representativeness, qualification, experience, reputation, career standing, and personal qualities.

An answer from one of the interviewees indicated that:

> Obviously we used a mixture of criteria. Certainly we were concerned about representativeness in the sense of both professions or careers, in the sense of grography, and in the sense of identification with various stake-holder groups in education. That was one set of criteria related to representativeness.
>
> In addition, we were concerned with having certain kinds of skills. We wanted really two different kinds of skills in our people. One was the ability to actually give some leadership service in a particular area ... The second kind of skill was some indication of an ability to work in a committee or semi-consensus situation; that the person on a personality basis was not a loner who would be difficult to work in that kind of situation [Interview A6].

Some members of the Commission Board did not seem to be aware of the reasons why they were chosen, whereas other members gave some indication of their knowledge of the Commissioner's reasons. For instance, another interviewee said:

> In a way he indicated the reason. He wanted some people on the board who were directly involved in the operation or in the coordination of the operation of the institutions, and some people with other kinds of interests. The range of interests that the members of the Commission Board had was relatively wide. Perhaps Dr. Worth began with a description of the range and then tried to fit people into that description. [Interview A5].

Representativeness, qualification, experience, and reputation of the members who were selected are illustrated in Appendix A.

Individual Responsibilities

In a previous section the responsibilities of the Board members as a group have been mentioned. This section deals with the responsibilities of the members as individuals. It is possible and likely that some responsibilities were overlapping.

Figure 5.2 summarizes the responsibilities of the individual members of the Commission Board. Of note, there were two principal roles, leadership and liaison. Also, some members had a third role to perform.

A leadership role was assigned to each member in order that he would assume full responsibility for the fulfillment of a major task or of major tasks of the Commission. In carrying out this role, the member was expected to recruit additional personnel and to serve as chairman (coordinator) or co-chairman (associate coordinator) of the committee. The member might have been assigned to organize task or tasks which required participation of certain interest groups. Members who were involved in both kinds of tasks had to assume public involvement as a primary role and a co-chairmanship as a secondary role.

A liaison role was assigned to all but one member. The purpose of this role was to provide linkages between the Commission and certain organizations or public

FIGURE 5.2

COMMISSION BOARD MEMBERS' RESPONSIBILITIES CHART

Board Member	Leadership	Liaison	Other
Anderson	Submissions Hearings Conferences	--	Office Administration Supporting Service
Downey	Position Papers Research Studies	H.R.R.C. Other Research Organizations Alberta Bureau of Statistics	--
Haney	N-12 Task Force	Public School Boards Rural Mun. Dist.& Counties Farm Organizations A.S.T.A. Public (Southern Alberta)	--
Keeler	N-12 Task Force	Professional School Personnel & Organizations Private Schools Indian Schools	--
Kolesar	Lifelong Education Task Force	Prov.Govt.Depts., Boards Councils, etc. Alta.Vocational Centre Educ.TV Pilot Project	--

FIGURE 5.2 Continued

COMMISSION BOARD MEMBERS' RESPONSIBILITIES CHART

Board Member	Leadership	Liaison	Other
O'Byrne	Hearings Lifelong Education Task Force	Separate School Boards A.C.S.T.A. Public(Northern Alberta)	--
Smith	--	Post-Secondary Institutions & Personnel Universities Commission Colleges Commission	Special Consultant to Post-Secondary Task Force
Worth	Commission Board Post-Secondary Task Force Review Panel	Provincial Government Federal Government City & Urban Mun. Councils Home & School Association Public (Central Alberta)	General Administration

sectors. The assignment was considered in line with the experience, expertise, residence, and position or career of the individual member. For example, Mr. Haney who was a local businessman in southern Alberta and had been a school trustee was given a liaison role with the public in southern Alberta, farm organizations, rural municipal districts and counties, public school boards, and the ASTA. The liaison role by individual members was important to the work of the Commission in that it served a catalytic and mediation function in such matters as public hearings, submissions, and exchange of information between the Commission and the bodies with which it was in contact.

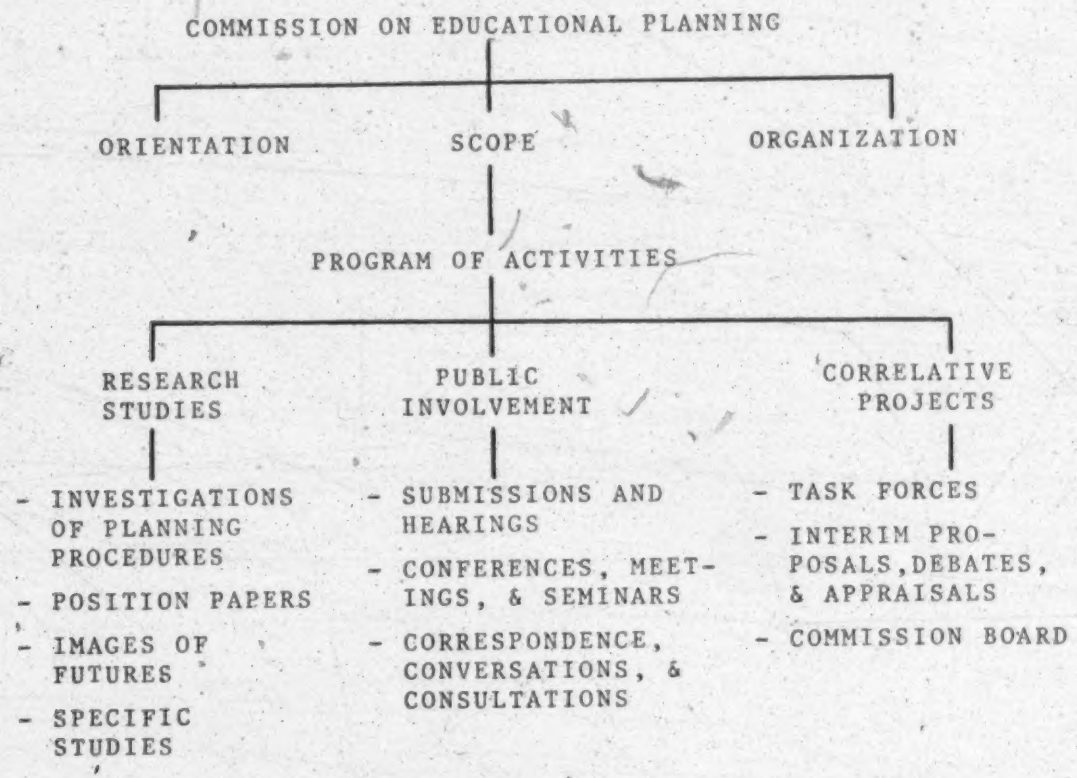
THE DESIGN OF THE ACTIVITIES

The CEP may be viewed as a planning body for education at the provincial level in Alberta. An inspection of its activities and the relationships among them would indicate the manner in which the Commission operated to fulfill its planning responsibility.

Figure 5.3 shows the organization of the CEP activities [OECD, 1972 and CEP leaflet]. Mention has been made about the orientation, scope, and organization. Of further interest is the program of activities as shown in the chart. These activities fall into three categories: research studies, public involvement, and correlative

FIGURE 5.3

ORGANIZATION OF CEP ACTIVITIES



projects.

Research Studies

The research studies represented an endeavour to capture current knowledge and to tap the expertise and talents which were particularly relevant to the undertaking of planning. Included in this category were:

1. Investigations of planning procedures, such as Evaluation of Instructional Programs, An Overview of Planning in Education, and Curriculum Planning in Alberta. There were nine studies of this nature. (see Appendix B1). The purposes of these investigations were:

> (a) To help the CEP define the scope of educational planning;
>
> (b) To relate planning to such other functions as research and development;
>
> (c) To clarify what might be achieved through more systemic planning and how this might be done; and
>
> (d) To identify proposals for the more adequate fulfillment of the planning functions in the decades ahead [OECD,1972:p6 and CEP leaflet].

2. Position papers on differing aspects of educational elements such as Aims and Objectives, Educational Facilities, and Administrative Personnel. These position papers were prepared by scholar-specialists in education. There were eleven of these papers (see Appendix B2). The Commission stated three purposes in having them prepared:

(a) To bring to the attention of the CEP informed points of view regarding a series of issues;

(b) To suggest basic concepts or principles to guide planning and development at all levels of education in the years to come; and

(c) To project contemporary thought into the future.

[OECD, 1972:6 and CEP leaflet].

3. Studies on images of the future such as Social Futures: Alberta 1970-2005 and The Future and Education: Alberta 1970-2005. Four reports were produced which dealt with forecasting of a variety of social, economic, demographic, and educational factors (see Appendix B3). They were designed to serve these purposes:

(a) To offer a glimpse of foreseeable conditions for tomorrow's education;

(b) To provide vantage points for assessing where we should be headed; and

(c) To suggest some leverage points for influencing the direction and pace of change.

[OECD, 1972:6 and CEP leaflet].

4. Studies on specific topics such as The Open University: A Report to HRRC, Current and Future Problems of Alberta School Principals, and Goal Perceptions and Preferences in Organizations. There were seven of these studies, (see Appendix B4). The purposes of these specific studies were not explicitly expressed, perhaps due to their inherently divergent focuses.

Public Involvement

This category of activity may be assumed to serve three purposes: (1) to stimulate interactions among individuals, groups and organizations about educational issues; (2) to build up a reservoir of values emerging from those interactions; and (3) to place value judgments on those collected values in order to finalize them and establish a reasonable priority listing. It may be envisaged as a possible way in which the CEP was influenced in arriving at the recommendations.

The activities in this category include the following:

1. Submission from 330 individuals and groups
2. Thirty-six public hearings involving more than 5,000 persons held in twenty locations throughout Alberta, including rural and urban centers, schools, colleges, universities, Indian reservations, and a penal institution.
3. Eleven one-day conferences for consideration of each of the eleven position papers. To these 1,500 individuals were attracted.

4. A Congress on the Future, designed to stimulate thinking about the implications and effects upon public policy of selected futures forecasts. At this about 300 opinion leaders from all walks of life were in attendance.
5. Three seminars designed to examine the interim proposals of the task forces were attended by over 500 citizens.
6. Public meetings in various parts of Alberta, designed for further discussion of the task forces interim proposals, involved participation by almost 1,000 persons.
7. Meetings with groups and organizations throughout the province.
8. Correspondence, conversation, and consultation with numerous individuals such as students, parents, taxpayers, teachers, and businessmen.[OECD,1972: pp.7-8].

Correlative Projects

The CEP did seem to indicate clearly what the purposes of these undertakings were when they were considered as separate activities. Perhaps the objectives of each single project might reflect their purposes as a

collectivity.

Task Forces. The responsibility of each of the three task forces -- N-12, Post-Secondary, and Lifelong Education -- was mentioned in a preceding section. This responsibility required the task force members to take part in several activities. Specifically these members had the following involvements:

- They read widely, including the submissions which were made to the CEP and research reports;
- They attended all of the public and semi-public activities of the Commission;
- They participated in many conferences in Canada as well as in the United States and Europe;
- They visited educational institutions and conversed with students and staff;
- They consulted with laymen and professional educators throughout the period of fourteen months of their work.

[OECD, 1972:8 and CEP leaflet].

These involvements illustrated the manner in which the members of the task forces attempted to accumulate knowledge and information from various sources and in several forms which they later synthesized into a set of

interim proposals. For the few months following their issuance, examinations, deliberations and debates were made of these proposals by other individuals and groups. Written appraisals were also obtained from individuals in this province as well as in other provinces and from persons outside the country. The task forces then examined these reactions, reconsidered their proposals, and made some changes in them.

Commission Board The Commission Board had been another correlative mechanism in the Commission's work. Mention has already been made of the tasks of the Board as a collectivity and of the responsibilities of the individual members. Perhaps it could be observed here that the Commission Board did serve correlative purposes. This contention becomes clearer when the involvements of the Board are somewhat elaborated. This elaboration was gathered from an interview with the Commissioner.

In defining policies and procedures, the Board operated in the following manner:

> .'. They worked with me in terms of developing that overall PERT diagram in which we said, "All right, look. We're going to do certain things. We're going to have public hearings. We're going to have certain kinds of research studies. We're going to have some task forces." And then they helped to find policies under which these groups would work. When we got reports back from them, we analyzed them and tried to pull out the elements that would seem to be substantially in agreement or in disagreement ... [Interview A6].

With reference to analyzing information and proposals -- a continuity of the above exercise -- the Commission Board members read and examined all of the Research Studies previously mentioned. The Commissioner explained this activity as follows:

> ... We would look at it and say, "There! That seems to be a good proposal or a good idea for these reasons ..." Or we would look at it and say, "There are some data which are generated by this study. What are the implications of it for the content of curriculum or for early education?" There was such a bulk of material that obviously they couldn't analyze every bit of information or proposal. We did have conflicting proposals in our submissions ... So what the Commission Board would do would be to look at these arguments and to zero in on what seemed to be the most feasible and defensible position ... [Interview A6].

The Commission Board also served as a reservoir of knowledge and information which was valuable for the correlative activity of the Commission. With respect to the contribution to the work of the Commission, the Commissioner gave these illustrations in an interview:

> Let me give an illustration in connection with separate schools in rural areas. We had a diversity of opinions and proposals regarding whether or not the large school unit concept in rural Alberta should be expanded to permit separate schools to organize on the same basis as public schools. Mr. Haney, because he had been a chairman of a county school board and worked in rural areas and worked with trustees for a long time, was able to give us very very good advice based on his knowledge of the situation with respect to how workable some of these proposals were and what the implications or impacts of them might be ...

> At one stage in drafting our report we proposed that a teacher's certificate only be good for five years. Dr. Keeler, over a series of a couple of meetings argued very strongly against the proposal. He convinced us that there were sound reasons for the procedure followed. For example, one of them was that the administrative task of reviewing the certification of five to eight thousand teachers a year would be very difficult. If you spread it over ten years you are down to twenty-five hundred to three thousand.
>
> ... I think Mr. O'Byrne, because he was a Supreme Court Justice, was able to provide some of us who knew very little about the law with insight about human rights and about the legal status of issues and so on. We couldn't get it any other way unless we hired a lawyer. He could do it on the spot in our discussion as we went along [Interview A6].

These illustrations demonstrated how the criticisms and the insight of one member, not initially shared by anyone, influenced the thinking of the total group and complemented the theoretical characteristics of some of the submissions. The fusion effort of the Commission Board served to reconcile the proposals which came from a bias perspective.

THE PROCEDURES FOR THE PLANNING ACTIVITIES

In the previous sections the tasks or activities of the Commission were explained in detail. This section is a description of how those activities were generated and the manner in which they were performed with respect to the time lines, the interconnection among them, and the sequence

or procedural steps of identifiable individual activities.

Procedural Planning and PERT chart

The procedural planning was done, in a large part, by the Commissioner with the assistance of some member of the Board. On this, one of the interviewees had this to say:

> Dr. Worth had played a major role in the preparation of the procedural outline along with two or three others who were more prominent than some of the rest of us, ... [names of three Board members] In working with the Board, Dr. Worth worked more closely with some members than with others because of their expertise and availability. [Interview A5].

The first few meetings of the Commission Board were spent on designing the tasks. Although it was not correct to assume that the Commissioner merely presented to the Board a list of activities on which to base decisions [Interview A4], it did occur that "...by the time we came to a Commission Board meeting we were reacting to the material that had already been prepared, and we were making suggestions occasionally regarding the things that were prepared..."[Interview A5].

It would seem valid to say that the Commissioner together with the Commission Board, through their meetings, decided on the types of activities to undertake and when to undertake them.

The major outcome of this procedural planning was

the Program of Activities which was displayed on a PERT chart in Figure 5.4. The interviews with the Commission Board members helped clarify this chart.

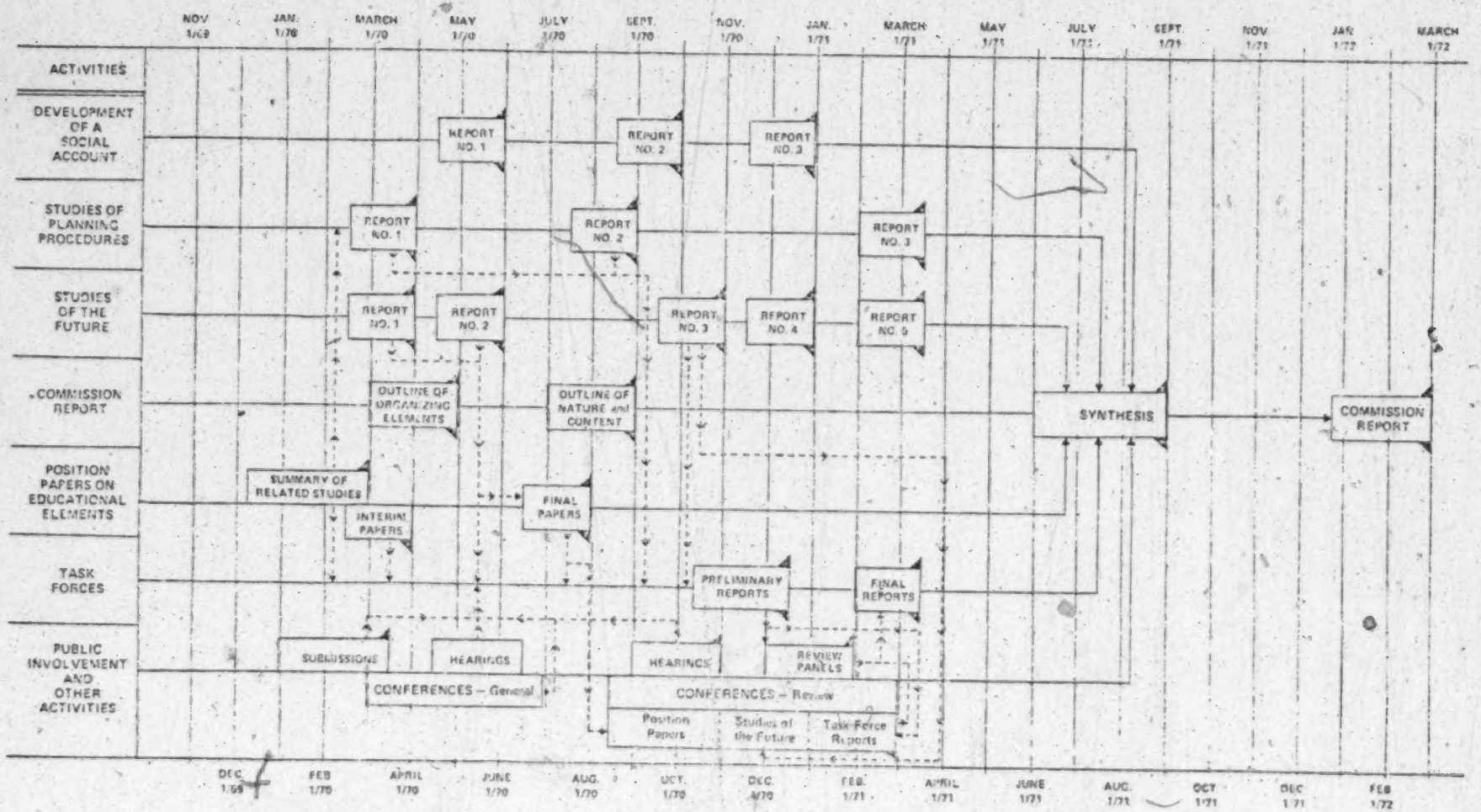
On the chart the elements of seven categories of activities were superimposed on a time line so that a number of activities were underway simultaneously. The dark lines across the chart represented the critical paths of major activities, while the dotted lines signified the input of one element to another, not necessarily of the same activity category.

In the middle, the Commission Report, was the activity that served as the focus of the whole program marked by the synthesis. The two events along the path of this activity, Outline of Organizing Elements and Outline of Nature and Content of the final report, indicated the Commission Board's attempt to prescribe the fundamentals, form, and style of the final product (later entitled The Choice of the Futures).

The first three categories of activities in the chart were the tasks to be fulfilled exclusively by the Alberta Human Resources Research Council (HRRC) which was used by the Commission because of its strong research capabilities. The reports on the Development of a Social Account (although they did not proceed as originally planned

Figure 5.4

PROGRAM OF ACTIVITIES



Source: CEP, December 1969.

because of certain financial difficulties) were intended to provide input for the synthesis. The Studies of Planning Procedures were designed to produce reports available for the Task Forces personnel prior to the production of their Preliminary Reports. The Studies of the Future, as the chart indicated, resulted in reports which became input for several other activities at several points on the time line, especially for the Task Forces.

The Position Papers on Educational Elements were outside the territory of the CEP and the HRRC. As explained in a preceding section, these papers were prepared by educational leaders in their respective fields of interest. They were supposed to be completed and made available for the Task Forces long before they embarked upon preparing the Preliminary Reports. However, these papers were not available until much later [Interview A5].

As explained previously, the Task Forces and the Public Involvement and Other Activities were the prime concerns of members of the Commission Board. Mention has already been made of the purpose and nature of these activities. Further comment is that while the activity of the Task Forces represented the technical aspect of the planning function of the CEP according to its mandate, the Public Involvement activities became the political aspect.

Public Hearings

Whether or not public hearing is a planning tool requires some consideration. Generally speaking, it is a political device for participation of the citizenry in societal affairs. A public hearing is normally called for when a critical situation arises and there is a need for decision-making or decisive action. It is a means through which public opinions may be investigated in order to arrive at a conclusion which will provide a guide for governmental action. In a way, this is a technique whereby data may be collected concerning what may be conceived of as a solution to a problem. When this technique is used by a planning agency such as this Commission, it becomes a political tool by which participatory planning was made possible. With reference to Dror [1969: 164-166], a public hearing provides a channel through which values held by the public may be received for processing -- a crucial step in an optimum model of policymaking. When this concept is applied to planning, the processing of values is thought to improve the effectiveness of planning in that it tends to increase commonalities as well as commitments on the part of the citizenry to plan implementation.

The approach that the Commission took in conducting public hearings appeared to be well organized. According to one of the Board members;

> We had quite an extensive advertising program throughout the province. We had a deadline for briefs... When a brief came in, we photocopied it and every member of the board had a copy of every brief. I would guess there were somewhere between three and four hundred briefs.
>
> When we were going to a small town, we would arrange to have someone on the ground who would be responsible for setting up the meeting place and talking it up among the local people. We would arrange at least to have some student leaders, professional leaders, civic leaders, and so on, there [Interview A2].

Since most members of the Board devoted only about one-third of their work time to the activities of the Commission, nobody was able to attend all public meetings except the Commissioner and his administrative assistant (who was also a Board member). The Board simply worked out a schedule for participation in hearings on the basis of the availability of these members. Normally there would be about five Board members present at each meeting [Interview A2].

In each meeting, the Board members would divide up their responsibilities for the questions. All members having read the briefs, a particular Board member would be asked to question a particular presenter of a brief. Almost invariably the Commissioner would make an opening speech which soon became consistent in content [Interview A2].

The meeting was also organized in such a way that

the day was productively spent. As one interviewee related, even the coffee break seldom passed without the Board member being on duty. The interviewee had this to say:

> [At the coffee break] if contact was to be done, each one of the Commission Board members who was present would be assigned to talk to a particular person such as media people. We wanted them to know that we were coming to town or that we had been there [Interview A2].

It would seem that attracting local people to the meeting was a prime concern apart from inspiring them to become responsive to educational issues. A factor that helped reduce the seriousness of this problem was that all members of the Board, taken together, were quite knowledgeable about key persons in the world of education in Alberta. One interviewee stated:

> After it had been decided where we were going, which took care of the geography of the province, we would make personal contact with the key person in that area. Every place we went there would be someone whom one of the Commission Board members knew from past associations. So there was always some good liaison [Interview A2].

Further effort was taken to make participation in the public hearing a reward to the local people. The Commission tried to make those people who were involved feel that they were a part of the ongoing work. One of the interviewees thought that this attempt was one of the most important aspects of the correlative part of the function of the Commission. He described the situation as follows:

> After we finished our public hearing, when something of interest came up, the people in those towns who were instrumental in organizing the public meetings became our local ambassadors. They received information and playbacks.
>
> Everybody who submitted a brief got a letter thanking him for the interest. If I'm not mistaken, they got on some kind of a mailing list of the nature I just can't quite recall [Interview A 2].

The same interviewee went on to say:

> I know very well that most commissions have public hearings, but I couldn't commend what other commissions have done with continuing the interest and the participation of the public. I'm satisfied that our commission did a good job in that respect. And if I'm not mistaken some of these people got a complementary copy of the final report [Interview A2].

Thus it had been indicated that when a public hearing was used as a planning tool by the CEP there was a deliberate attempt to make this as appealing to the public as possible. The CEP took advantage of past association with the local people in such a way that these people would attract the interest and participation of their friends or acquaintances. By deliberately rewarding the interest and participation of the local people, the Commission was able to maintain these people as part of the machinery of the operation of the organization.

The Task Forces

The decisions to have three task forces developed from an agreement among the Commission Board members during

the first few meetings. It was stated earlier that the Board members were assigned to these task forces to act as coordinators and associate coordinators. The next step was to select the task force members. According to an interview [Interview A5], the selection of these members was a joint effort of the Commissioner, the respective Board member, and some other individuals (not specified).

After the task forces were agreed to and the responsibilities distributed among the Board members, they along with the Commissioner laid out the terms of reference for the task forces. Basically, the terms of reference were the same for all task forces. They included the area of examination, the preparation of a report, and the presentation of the report to a public meeting [Interview A5].

The outlines of the reports to be produced by the task forces were also similar. These outlines dealt with such matters as principles, organization, process, curriculum, resources, finance, and planning [See, for example, Interim Proposals: N-12 Education Task Force].

The actual operation of the task forces was quite independent of the Commission Board. An interviewee put it this way:

> When it came to actually working on the task force, the Board did not monitor that very closely. There was little interference from other Board members with the task force activities. However,

> there was exchange of ideas among task force coordinators that resulted in some adjustments in the procedure and the timing of activities in the various task forces [Interview A5].

In working with the task force, the Board member who served as the coordinator took responsibility for (1) calling and chairing all the meetings, (2) directing the discussion or leading the discussion at meetings, and (3) working with the other task force members to divide up the responsibilities that the task force undertook. Then there was some additional responsibility such as selecting a secretary and employing people to do some writing on behalf of the task force.

After the interim proposal was written, a conference was held. The task of the Coordinator was to introduce the report while a few other members presented summary statements concerning certain sections of the proposal. Typically, the task force conference attracted a few hundred people some of whom gave their reactions to the proposal.

Aside from a conference for each task force, there were submissions from individuals and groups and these submissions were later summarized. [See Maddocks, 1970]. Further, these task force proposals were also reacted to by review panels of six individuals each. Of the six individuals, three were Albertans and the other three were from

outside of the province.

The reactions gathered from the conference, submissions, and panelists were then considered by the task force members. The outcome was not the final report, but an addendum which accompanied the interim proposal.

SUMMARY AND DISCUSSION

The Alberta Commission on Educational Planning (CEP) was a hybrid educational planning and educational policy-recommending body at the provincial level. It was charged with the tasks of projecting the future societal and individual needs for Alberta and recommending measures to satisfy these needs through the educational system. Moreover, it was given the responsibility of proposing bases for priority judgments in educational policies, and of considering permanent mechanisms for planning and policymaking in the Alberta educational system.

The Commission had but one Commissioner, who by Order-in-Council was given the authority of recruiting necessary personnel and seeking research and task capabilities from various sources. Aside from a coalition with the Alberta Human Resources Research Council (HRRC) as an agency to provide continuing research capabilities, there was a procurement of manpower from both the educational circles

and some other professional and career groups in order to form a Commission Board consisting of nine members. The tasks at hand also made it necessary to rely on university staff as well as school systems personnel for the operation of task forces on specific aspects of the educational delivery system.

In the first phase of its operation, the Commission designed its program of activities, distributed the various responsibilities among the Commission Board members, set the target dates for the completion of its activities in the form of a PERT chart, and sought cooperation in the conduct of research studies which would lay a foundation for the ensuing operation. Participants in this phase included the Commission Board members, the personnel of HRRC, institutional staff members, and other scholars.

The second phase of the CEP work consisted of public involvement activities and correlative projects. Submissions and public hearings were conducted in the usual Royal Commission style. All were concerned with the educational issues as guided by the terms of reference given by the Order-in-Council. This was the stage at which a diversity of ideas regarding education streaming in from various sources and in a variety of forms was disseminated, analyzed, debated, reconciled, and synthesized. The three

main sources of information were the research studies, the task force interim proposals and the public opinions both in writing and in words.

The third phase of the CEP operation was the synthesizing and the writing of the report entitled A Choice of Futures. This report represented the final product of the Commission which is examined in Chapter 6.

The work of the Alberta Commission on Educational Planning, unlike that of other preceding commissions here and elsewhere, was designed to serve a bridging function in planning. The Commission performed the dual role of engaging in planning directly and making recommendations for permanent effective mechanisms of educational planning for the province. This chapter has described the manner in which the Commission managed to accomplish this assignment.

As noted in a previous section, the ideas of the totality and futuristic emphasis in education were two strong orientations of the CEP as indicated by the terms of reference. In these respects, the work of the Commission included planning for all levels and forms of education with the time line extended beyond the immediate future of one to three years as was the case for planning activities at the Department of Education.

The CEP did function as a planning body for Alberta. However, its structure was different from the planning unit described in the literature. The Commission Board was composed of professional generalists as well as lay persons. Perhaps none of the Board members considered himself to be a planner. With some help from a variety of professional groups, such as the HRRC staff and University professors as well as people from elementary and secondary school systems, research and planning capabilities of the Commission were augmented.

The planning procedures of the CEP resulted from an attempt to combine research studies, public involvement and correlative projects as described earlier. Research studies may be viewed as the technical dimension of the CEP's planning procedures; whereas public involvement may be thought of as the political dimension. Correlative projects, however, belong to both the technical and political dimensions.

The use of the PERT chart became an administrative tool for the CEP. The PERT diagram seemed to contribute to the work of the Commission in that it required careful planning for major activities and time lines. The diagram showed relationships among these activities with reference to time. All who were involved in the work of the CEP were controlled by this diagram in keeping within datelines.

It should not be overlooked that the use of the PERT chart enabled the Commission to complete its assignment in due time.

The planning activities of the CEP seemed to have involved a large number of participants. It included nine persons on the Board, thirty-three individuals (professional in most cases) on the task forces, and some seventy research contributors and consultants [A Choice of Futures, p.305]. It also included thousands of people in public involvement activities such as submissions, public hearings, and seminars. Thus, planning by the CEP may be viewed as participatory planning which involved a diversity of people. Besides, the work of the Commission was based on a number of references [A Choice of Futures, pp.309-320]. Therefore, the planning endeavor by the Commission was founded on extensive information relevant to Alberta and to educational planning in general.

Chapter 6

THE CEP'S OUTCOMES AND MACHINERY FOR EVALUATION OF RESPONSE TO RECOMMENDATIONS

Chapter 5 studied factors leading to the ordering of the CEP and brought into focus its structures and procedures for planning. The present chapter further examines the final outcomes of the CEP's operation, including the report, top-priority proposals, and recommendations for educational planning in Alberta. In addition, the chapter reports on the machinery set up for an evaluation of reactions to the CEP's recommendations, machinery which is considered to be part of the planning process.

THE FINAL OUTCOMES

This section concerns itself with the final outcomes of the operation of the Commission on Educational Planning. The major focus is directed toward the Commission Report indicated in the PERT diagram together with the reporting strategies. The latter had been devised to serve as a process which might eventually lead to the implementation of the recommendations contained in the report.

The Commission Report: A Choice of Futures

The final report of the Commission was entitled

A Choice of Futures. It was deliberately designed such that it had some unique characteristics which bore no resemblance to the characteristics of the report of any other Royal Commission. With partial reference to the introduction of the report and Dr. Worth's interpretation or explanation [OECD, 1972: p.9 and p.12] here are some notable features of the report:

(1) It was written in popular style and colorfully illustrated, without conventional documentation in the form of footnotes and quotations, the underlying principle being that "communication was deemed more important than scholarly respectability" [OECD, 1972: p.12].

(2) The volume of recommendations was not presented as a lengthy listing of discrete proposed solutions to problems; rather, proposals for change were made in context so that the complex interlocking problems would be examined and interpreted likewise;

(3) The report was almost 350 pages long with about one-third containing some type of color illustrations such as pictures, charts, and graphic designs. From its appearance, the report was a consumer's good that aroused interest and improved readability, although many serious readers might find too many distractions in it;

(4) The report did not necessarily contain single solutions to problems, but rather alternatives, one of which could be selected for a particular situation. When solutions are left to the people's choices, there will be a multitude of combinations;

(5) Although the report left out documentation in the main text, references were listed chapter by chapter in an appendix. Serious readers might find this to their liking.

Contents The report contained seven main chapters and appendices. The seven major chapters are summarized as shown in Appendix C.

Of these contents, two are reviewed in the next sections. They are concerned with the 'top-ten' proposals which the Commission recommended as an immediate starting-point, and with the recommendations on the planning structure and procedure for the educational system in Alberta.

The 'Top-Ten' Recommendations

One of the mandates of the Commission was to "establish bases for the priority judgments of government with respect to the course of public education in Alberta for the next decade" [See Terms of Reference]. Faced with this mandate, the Commission left the selection of the

priority judgments in large part with the public. However, the Commission went so far as to develop a set of ten priorities and urging that they be given immediate attention by the Alberta government.

The 'top-ten' proposals were:

(1) Provision of universal opportunity and selective experience in early education;

(2) Abolition of Grade XII departmental examinations;

(3) Inauguration of the Alberta Academy, Early Ed and the supporting ACCESS network;

(4) Extension of opportunities in further education;

(5) Modification in certification requirements for teachers in early and basic education;

(6) Reorganization of the Department of Education and Department of Advanced Education;

(7) Revision of funding arrangements for all levels of recurrent education, including provisions for life experience and student assistance;

(8) Modification of the school year and of procedures for the transfer of credits;

(9) Reduction in the length of all general and most professional first degree programs in universities;

(10) Preparation of an Integrated Provincial Development Plan [A Choice of Futures, p.300].

In suggesting these priorities, the Commission based its recommendations on two important factors -- the need for equity and the need for momentum -- which were spelled out on pages 299 and 300 of the report.

On the need for equity, the Commission stated:

> The principle of equity in schooling sets a direction in which provincial policies may try to move.... Past attempts to provide greater equity in educational opportunity have generally been of three kinds: changes in the nature and availability of schooling...; changes in the organization of schooling towards greater breadth and horizontal movement...; (and) changes in the process of schooling that make it possible for larger numbers than before to succeed.... These changes have been geared primarily to the young. Consequently, they have contributed to inequality among generations [A Choice of Futures, p.299].

As the Commission saw this inequality likely to persist, the 'top-ten' proposals were recommended as measures towards equity.

On the need for momentum, the Commission stated:

> Practical experience in developing countries ... and developed countries ... shows that growth in the social, economic or educational spheres is not linear. That is, it does not happen in a logical and successive way that can be permanently planned over a future of more than a few years.... This practical experience in planning is now supported by the latest concepts in systems theory, cybernetics and ecology...
>
> It is, therefore, essential that the steps that are taken now... be in the right direction. When we create mechanisms we create momentum.... If we can start it in the right direction, the power of change can be more easily harnessed, reviewed and developed[A Choice of Futures, pp.299-300].

The choice of those 'top-ten' recommendations was then, in part, based on the belief of creating momentum or mechanisms in the right direction.

Recommendations on the Planning Mechanisms for Alberta

Special attention is given to the recommendations on planning mechanisms because of the likelihood that they will have significant impact on the reorganization of the Alberta educational system. In addition, these planning mechanisms are undoubtedly the subject of interest for students of educational planning.

Intent of Educational Planning. It was recommended that the efforts of the Alberta educational system be directed toward reconstructive planning which involves "deliberate intervention to alter expected events" as opposed to adaptive planning which is aimed at adapting to anticipated trends [A Choice of Futures, p.218].

Objectives of Educational Planning. The Commission recognized that different objectives in educational planning have been given different degrees of emphasis during different periods in the past. For Alberta, the Commission recommended a comprehensive planning process which considers all these objectives, although the degree of attention given to each of them

might vary over time [A Choice of Futures, pp.219-222].

(1) Educational Planning for Orderly Growth. The expansion of education in a rapidly growing economy could be accomplished through simple increases in number, size, and extent of schooling. An example of further recommendations was increasing use of quantitative data through computerized information systems.

(2) Educational Planning for Economic Development. The Commission realized that economic objectives, such as investment in human resources and optimization of scarce resources, were still pertinent to education in Alberta. These objectives were seen to have certain implications for manpower planning in this province. A related recommendation was that local and provincial efforts should be an integral aspect of a larger national endeavor in relating manpower demand statistics to specific programs at all organizational levels.

(3) Educational Planning for Social Change. The Commission suggested that this objective at least rank equal with the objective for economic development. Equality of educational opportunity which had been the social objective of educational planning in the past should be maintained. It was recommended further that equality of educational opportunity be achieved through distribution

of resources according to both social and educational needs. This might result in unequal treatment of learners, but it would help eliminate undesirable educational disparities existing among various groups.

(4) Educational Planning for Efficient Operation. The Commission realized that certain reasons, such as the rising costs of education and a suspicion that the increases in educational output were far less than the increases in input, called for an emphasis on making better use of available resources. The principle of efficiency in operation led the Commission to make other suggestions. An example was the recommendation that there be scrupulous monitoring at each stage of the decision process from setting goals to evaluating results.

(5) Educational Planning for Excellent Schooling. Because of the elusive nature of excellence in schooling, the Commission urged that Albertans make their stand known so that consent, consensus and compromise could be arrived at and thus form a basis for making a move toward educational quality. The Commission recommended further that change in the process of education become the prime purpose for planning.

Guidelines for the Planning Processes and Structures. The Commission proposed six guidelines for the

development of processes and structures for educational planning in Alberta. The six guidelines were as follows [A Choice of Futures, pp. 222-224]:

(1) Location. Planning should be effectively linked to decision-making; that is, specialized units of planning should be placed close to where policies and decisions are made.

(2) Knowledge. Planning should be closely related to research and development in order to obtain more utility out of research which had been traditionally conducted by graduate degree earners.

(3) Conduct. Planning should be dispersed throughout the educational system and not restricted to specialized planning units.

(4) Freedom. Planning should permit high degrees of autonomy at the local, institutional and individual levels. Moreover, a planning unit should not be used as a control device.

(5) Involvement. The Commission recommended widespread participation in educational planning by both the public and learners who are to be viewed as the clients of the educational enterprise.

Conceptual Framework for Planning. The conceptual framework for educational planning that the Commission proposed for Alberta was based upon a systems approach. As illustrated in Figure 6.1, the educational system is composed of four basic components: resource inputs, transaction, personal and social outputs, and planning plus research and development. These components are parallel to the four basic units of a general systems model -- input, throughput, output, and feedback. In the Commission's conceptualization, planning was designated the function of coordinating and evaluating the system's performance [A Choice of Futures, pp.225-226].

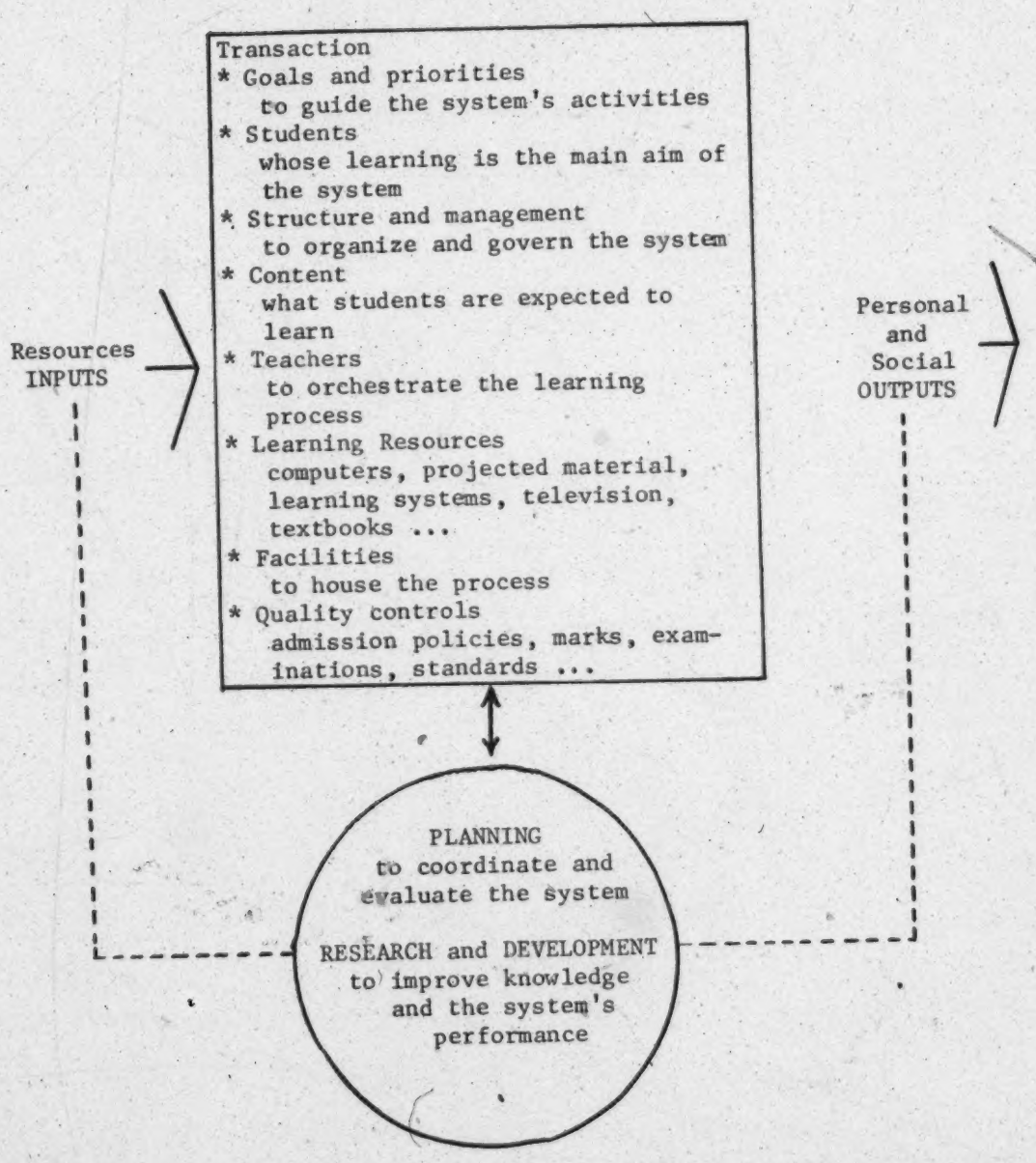
Phases of the Planning Process. The Commission suggested that five phases of the planning process be applicable to Alberta. The five phases follow [A Choice of Futures, pp.226-230]:

(1) Identifying Goals. The Commission anticipated difficulties in finding a means for the application of criteria for goal-setting. The only means available was thought to be human judgment supported by study, discussion and analytical techniques already available.

(2) Anticipating the Future. The Commission urged that both short-term and long-term predictions be incorporated into planning. Short-range planning should

Figure 6.1

MAJOR COMPONENTS OF A SYSTEM FOR SCHOOLING


Transaction
* Goals and priorities
to guide the system's activities
* Students
whose learning is the main aim of the system
* Structure and management
to organize and govern the system
* Content
what students are expected to learn
* Teachers
to orchestrate the learning process
* Learning Resources
computers, projected material, learning systems, television, textbooks ...
* Facilities
to house the process
* Quality controls
admission policies, marks, examinations, standards ...
Resources INPUTS
Personal and Social OUTPUTS
PLANNING
to coordinate and evaluate the system
RESEARCH and DEVELOPMENT
to improve knowledge and the system's performance

Source: A Choice of Futures: p. 226

make use of simulation models for predicting costs and personnel requirements under different assumptions or for variations in selected factors. Long-range planning should make use of qualitative techniques such as Delphi, scenario and cross impact analysis.

(3) Evaluating Alternatives. Evaluation should be an integral part of the planning process. Such evaluation techniques as cost-benefit, cost-effectiveness, and cost-quality analyses might be useful aids to planning, especially in meeting the objective of efficiency in operation.

(4) Allocating Resources. Program budgeting has proved to be an effective tool for the rational allocation of resources in education. The Commission recommended that the Program Accounting and Budgeting System be adapted for use in Alberta education.

(5) Monitoring Operations. The Commission took the view that an adequate information base was crucially important for planning. In this province, there was need to improve the two factors contributing to effectiveness of the monitoring phase of planning: availability of information about the educational system and a method of diffusing information. The first factor could be partially improved through the development of a classification

scheme complementary within the educational system and to other public services and Statistics Canada. The second factor could be improved through the development of procedures for regulating the flow of information throughout the educational system.

The Planning Process and Structure. The Commission suggested a planning mechanism for Alberta education. This includes planning at the provincial, departmental, local and regional levels [A Choice of Futures, pp.72-73, pp.130-137 and pp.218-235].

Provincial Planning. The Commission conceived of the members of Legislature and the Cabinet as playing leading roles in provincial planning. These together with staff of the two Departments in Education, planning and research and development agencies, special consultants, and organized interest groups were to take the responsibility of establishing broad goals and priorities -- social and economic as well as educational -- for Alberta. The process would call for planning initiative in the departments concerned. It would also require a central planning body for the coordination, communication and consideration of priorities including the coordination of an Integrated Provincial Development Plan. The latter was recommended as a concerted effort of government departments coupled with the participation of the

citizenry in regional development.

Departmental Planning. It was recommended that a planning unit be established to serve the two Departments in Education simultaneously. The unit was to be responsible for identifying alternatives and assessing the implications and cross-impacts of these alternatives. It was supposed to perform several functions such as gathering information about needs and problems, translating goals and priorities into course of action, and proposing desirable and tenable changes in policy. It was required to undertake many specific tasks such as projecting enrolments and interpreting manpower needs.

Local Planning. The Commission advocated participatory planning which would provide greater opportunity for involvement by local people as well as by learners. To be included in the machinery were school councils and community-schools in basic education, and boards of governors and advisory committees in higher education.

Regional Planning. Planning should occur in every type of community, whether rural, small-city or metropolitan. There should be coordination of educational planning within and among early, basic, higher, and further education and with other planning agencies. Suggested means for coordination included regional learning

centers and regional offices of the Department of Education.

MACHINERY FOR EVALUATION OF RESPONSES TO THE CEP'S RECOMMENDATIONS

The process of educational planning in Alberta would not be complete without looking at activities beyond the operation and outcomes of the Alberta Commission on Educational Planning. Significant for this study are strategies which were used to elicit responses to the CEP's recommendations. Similarly, the machinery for evaluation of these responses is relevant to this study. While factors examined in the early section of Chapter 5 provide a connection between the past and the present, strategies and machinery reported in this section connect the present with the future of educational planning in this province.

Reporting and Informing Strategies

In preparing its report, the Commission envisaged four types of potential audiences:

1. The actively concerned, that is the provincial legislature, the officials of major stakeholder groups, and the institutions;
2. The directly affected, that is, the students, the parents, and the teachers;
3. The Alberta public; and

4. The Canadian public [OECD, 1972: p.9].

Because these audiences were different in their educational interests and backgrounds, a suitable form of report was necessary. As a result, the Commission produced a report which was cited as being convenient, easy to understand, commanding attention, concise, and meeting divergent needs [OECD, 1972: p.9].

As important as the report itself was a strategy for informing the public, The strategy was designed to operate in the following manner:

> Coinciding with the release of the report, a comprehensive public information program [was] conducted for about three months. It [had] a dual purpose: to arouse interest and create involvement, and to create sales for the report. The public information program [included] prime-time telecasts; radio, television and newspaper promotions; cable TV and ETV productions; preparation and circulation of a film; series of news releases from various government agencies aimed at particular audiences; and activities sponsored by the two provincial government departments in education [OECD, 1972: p.12].

By means of these reporting and informing strategies, the particular audiences were reached. These audiences, upon reading, hearing and contemplating the recommendations in the report, made their opinions known.

Prior to the termination of the assignment of the Alberta Commission on Educational Planning, the Cabinet Committee on Education (as mentioned in Chapter 4) was

given the task of monitoring these opinions. Submissions and briefs, including letters, arrived from various organizations and groups as well as from institutions and individuals. The next section looks at the work of this monitoring committee.

The Cabinet Committee on Education

As mentioned in Chapter 4, the Cabinet Committee on Education consisted of three members: the Minister of Education, the Minister of Advanced Education, and the Minister of Manpower and Labour. The Committee undertook the Choice of Futures Project in June, 1972. Mr. Larry T. Shorter, Director of Communications, Department of Education, became secretary. The Committee's task was to solicit reactions to the recommendations contained in the CEP report.

From an interview with Mr. Shorter it became clear that the Choice of Futures Project was comprised of three phases. The first phase, lasting between June 16, 1972 and October 15, 1972, involved a publicity campaign, speeches, and stimulating public responsiveness. The second phase, lasting between October 15, 1972 and February 28, 1973, involved studies and considerations of reactions from various groups and determination of policy changes in the departments or branches that these reactions were addressed to. The last phase, approximately

between March 1973 and May 1973, involved the final decisions of Committee members with respect to the stance of the government.

In the first stage of the project, the Cabinet Committee on Education attempted to arouse the interest of various groups, organizations, institutions, and the public at large. Their activities included public addresses, press releases, television programs, booklets and questionnaires. They also met once a week to discuss problems and evaluate responses to the CEP recommendations. In these meetings they considered ways in which reactions could be analyzed and assessed. The Committee also sent out letters to those who had presented briefs, other submissions or letters expressing their opinions. Further, abstracts were made of significant briefs and responses received during this period. Other responses were abstracted in the second period. Later on these abstracts were organized into three groups. The first group consisted of abstracts of "significant briefs and responses" received to October 15, 1972. The second group consisted of abstracts of "organizational briefs received between October 15, 1972 and February 28, 1973. The last group was a sample collection of "letters from the grassroots" received between July 1, 1972 and February 28, 1973 [Cabinet Committee on Education, 1972].

A total of some 3270 responses were received between June 1972 and February 1973. These responses were classified as follows:

403	letters from the grassroots
113	briefs from individuals
23	briefs from publicly elected boards
20	briefs from institutions
50	briefs from associations
21	briefs from departments or institutions
583	Choice of Futures questionnaires
1512	completed questionnaires from Edmonton Public evening students
537	completed questionnaires from Calgary Public evening students
3270	total

[Cabinet Committee on Education, 1973].

These responses, however, did not include hundreds of public meetings and discussions, a large volume of editorial responses and many open-line radio discussions. [Cabinet Committee on Education, 1973].

In the second phase of the project, besides meeting once a fortnight, the Committee mailed out a second letter to each person or group who submitted opinions [See Appendix D]. This letter indicated the department, the branch, or the office which the

particular opinion had special significance for or special interest to. It assured the person or group that the response had been influential. Simultaneously another letter, accompanied by a copy or excerpt of the brief (or submission), was sent out to the affected department, branch, or office [See Appendix D]. This letter informed the addressee of the procedure and requested consideration of the opinion in policy change. In this stage, then, the individual departments, branches and offices were requested to evaluate public and professional response to the CEP proposals.

In the last phase of the project, the individual Committee members -- particularly the Ministers of the two Departments in Education, together with their respective departmental officials -- considered the responses and decided on a position to take on behalf of the government. On March 30, 1973 the Minister of Education stated in the Legislative Assembly the government's position on the main themes of the CEP report [Alberta Hansard, 1973]. The position set forth was as follows:

1. The government accepts the position in the report that we should act on a set of goals, principles and ideals so as to influence where possible the future;

2. The government recognizes the tentative nature of future forecasting.... Nevertheless it appreciates the efforts of the Commission and finds its forecast valuable as a source of both warning (and) opportunity;

3. The government chooses neither the report's second phase industrial society, nor its people-centered society .... Our position would be somewhere between these two alternatives;

4. The government finds the Commission's concepts of life-long recurrent education and its work on aims and objectives as being especially important .... We endorse in principle the four ideals of education set forth in the report with some qualifications of each. We endorse in general the ten principles ..., recognizing ... (that) it is not always possible to fully implement those principles but they must be strived for;

5. The government endorses in principle the six goals of education ..., but not necessarily to the exclusion of other goals[Alberta Hansard, pp.1535-1536].

The Minister of Education also stated the positions of the Department on the 'top-ten' proposals of which six were relevant. The statement was as follows:

> Recommendation No.1 -- the provision of universal opportunity and selective experience in early (childhood) education -- implemented in part through the new early childhood services plan.
>
> Recommendation No.2 -- abolition of Grade 12 departmental examinations -- implemented, with new achievement measuring tests being developed.
>
> Recommendation No.5 -- modification in certification requirements for teachers of early and basic education -- implemented in part.
>
> Recommendation No.6 -- reorganization of the Department of Education -- implemented in part.
>
> Recommendation No.8 -- modification of the school year -- premature now.
>
> Recommendation No.10 -- preparation of an integrated provincial development plan -- rejected at this time [Alberta Hansard, 1973, p.1536].

On a later date in the last phase, the two Ministers in Education presented summarized response of the government with respect to some 400 specific recommendations in A Choice of Futures. The response was indicated in nine postures, namely:

(a) endorce in principle;
(b) reject in principle;
(c) still studying;
(d) have implemented, or are now implementing, in part or in whole;
(e) prepared to implement, depending on results of consultation and/or assignment of priorities;
(f) accept for the present;
(g) do not accept at this time;
(h) not our jurisdiction, but endorse; and
(i) not our jurisdiction, still studying for possible endorsation [Cabinet Committed on Education, 1973].

The action to be taken on these recommendations resided in the government as well as the individual Departments in Education. As of this date, the Committee is still receiving briefs, submissions and letters from groups and individuals.

SUMMARY AND DISCUSSION

Chapter 6 is concerned with the final outcomes of the CEP's operation, including the report, top-priority proposals, and recommendations for educational planning in

Alberta. It also reports on the machinery for evaluation of reactions to the CEP's recommendations.

The Final Outcomes

The Commission Report. The final report of the Commission was entitled A Choice of Futures. It was published in popular style and colorfully illustrated for communication purposes. Recommendations were presented in context, one being related to another. The report, in general, offered a multitude of solutions to particular problems.

Top-Priority Proposals. The Commission developed a set of ten top-priority proposals and urged that these proposals be given immediate attention by the government. The belief was that an immediate implementation of these proposals would become a lead to change in the right direction.

Planning Mechanisms Recommended for Alberta. The intent of educational planning should be directed toward deliberate change in the future. Planning should attend to all five objectives: orderly growth, economic development, social change, efficient operation, and excellent schooling. The planning processes and structures should follow the six guidelines of location, knowledge, conduct, freedom, and involvement. The conceptual framework for

planning should be based on a systems approach which includes four distinctive components: resource input, transaction, personal-social outputs, and planning plus research and development. The planning process should consist of five phases: identifying goals, anticipating the future, evaluating alternatives, allocating resources, and monitoring operations. For Alberta education, the planning process and structure should involve all four levels -- provincial, departmental, local and regional.

Machinery for Evaluation of Responses to the CEP's Recommendations

Reporting and Informing Strategies. The report itself was designed to incorporate the reporting and informing strategies. Besides, a public information program was conducted which included such activities as prime-time telecasts.

Cabinet Committee on Education. To solicit reactions to the CEP recommendations, the Cabinet Committee on Education undertook a project called The Choice of Futures Project. In the first phase, the Committee involved in a publicity campaign to stimulate public responsiveness. In the second phase, the Committee studied and assessed reactions from organizations, groups and individuals. Affected departments and branches were also requested to assess reactions that were addressed to them,

and to incorporate these reactions in policy changes. The last phase of the project involved the report on decisions of the government's postures with respect to specific recommendations contained in the CEP's report. The Committee, however, continued to function as a monitoring device for the government.

It has been mentioned in Chapter 5 that the CEP's mandate included four tasks. The tasks involved projecting societal and individual needs, recommending on adaptations of the educational system to meet those needs, proposing bases for priorities in educational policies, and proposing permanent mechanisms for educational administration, coordination and planning. Evidence in Chapter 6 indicates that the Commission had accomplished these tasks. In A Choice of Futures, Chapter I shows the fulfillment of the first task; Chapters II, III and IV show the fulfillment of the second task; Chapter VI shows the fulfillment of the third task; and Chapters III and V illustrate the fulfillment of the fourth task.

The ten top-priority proposals were thought to provide a starting point in the new direction for Alberta education. As of the date of this thesis only six of these proposals have been implemented, in part or in whole. The remaining four are either rejected or still under consideration. It is likely that the government is

prepared to implement those proposals which have not been rejected. However, any concrete action is not likely to occur until a much later date.

The planning mechanisms recommended for Alberta are based on a rationale which shows an influence from the Organization for Economic Cooperation and Development (OECD). A notable feature of the mechanism is the so-called intent of planning. The emphasis here is on planning _of_ the future" rather than "planning _for_ the future." In other words, the Alberta educational system must deliberately change the events that are predicted to occur. Chapter I in _A Choice of Futures_ urges the people of Alberta to choose a person-centred society as opposed to a second-phase industrial society. Accordingly, educational planning must incorporate the ideals and goals of a person-centre society. However, evidence in Chapter 6 of the thesis indicates that the government chooses neither of these alternatives. The government's preference is a middle-way solution, that is, a society which lies somewhere between the two alternatives.

A second notable feature of the proposed planning mechanisms is a provincial planning body for coordination, communication and priority consideration [_A Choice of Futures_, p.23]. This central planning body is suggested as a link with the Executive Council. As such, it will

have responsibilities for examining the need for planning units in various departments. It will also suggest strengthening or disbanding agencies which are already in existence, or creating new ones. The central planning body, if it is established, will function primarily as a service unit providing planning technologies and relevant information to other lower-level planning bodies.

A third notable feature is the planning unit to serve the two Departments of Education. This would accompany a reorganization of the two Departments. [A Choice of Futures, pp.132-137]. The function of this planning unit would be to coordinate, support and supplement the planning activities of the four divisions of the two Departments (early education, basic education, higher education, and further education). As of this date, there is no indication whether or not the planning unit will be implemented. The one bit of evidence so far is a rejection in principle of two divisions within the Department of Advanced Education -- higher education and further education [Cabinet Committee in Education, 1973].

The present chapter has looked at the intermediate product of the CEP's planning activities and the process of evaluating this product in the light of professional and public opinions. The following chapter examines further the substance of professional and public

reactions to some of the CEP's product.

Chapter 7

REACTIONS TO THE RECOMMENDATIONS OF THE ALBERTA COMMISSION ON EDUCATIONAL PLANNING

Professional and public reactions to recommendations by a planning commission may be thought of as part of the planning process. The model developed in Chapter 3 indicates that the future of educational planning in Alberta is affected partially by these reactions. The implementation of the recommendations is largely determined by the response of organizations, institutions, groups, and individuals. In like manner, government departments which are responsible for or affected by these recommendations have a strong influence on implementation.

Because of the constraining nature of professional and public opinions, an examination of the substance of these opinions may provide a clue to the future of educational planning in Alberta. This chapter studies initial reactions of personnel of the Department of Education and the reactions of the following groups: the Alberta Teachers' Association, the Alberta School Trustees' Association, and some other selected groups. While this is not a complete analysis of all reactions, it does serve the purpose of exploring professional and public response. An understanding of the educational planning process in Alberta is enhanced by this

introductory analysis.

INITIAL REACTIONS BY PERSONNEL OF THE DEPARTMENT OF EDUCATION

Selected Recommendations

The reactions of the senior officials of the Department of Education were made to some recommendations relevant to the operation of the Department. They include the following areas of consideration[A Choice of Futures]:

1. Functions of Basic Education

a. Planned Differentiation. The Commission recommended that there be a deliberate policy of planned differentiation by allowing certain schools to specialize, by providing for differentiation within a single school, and by institutionalizing area schools for superior service available for neighboring schools. Another concept that was advocated was the community school being defined as one which provides for interaction of all members in that location. An implicit result of this planned differentiation would be the abolition of existing attendance areas [pp.70-71].

b. Rural Education. The Commission recommended that basic education make provisions for equality of opportunity for rural population in order to upgrade the quality of life. To be successful in this

endeavour it was suggested that (1) the Integrated Provincial Development Plan be implemented, (2) there be a substantial revamping of school system boundaries and consequent reduction in the number of jurisdictions, and (3) regional learning centres (RLC) be established to provide special services as well as part of the proposed ACCESS network [pp.72-76].

c. Separate Schools. The Commission recommended that (1) separate school systems be permitted to organize on the basis of a school division, (2) all parents have the freedom to choose schools for their children, and (3) there be a negotiated provision for exchange of students between public and separate school jurisdictions [pp.76-77].

2. School Year Reorganization

The Commission proposed three alternative approaches to school year organization: divided school year; voluntary term rotation, and mandatory term rotation. A divided school year principle would shift the holiday period to June-July, provide for two entry and exit points, and allow for a long Christmas vacation or short break periods halfway through the fall and spring terms. Summer sessions and intersessions would also accompany this arrangement. On the voluntary term rotation basis, students would elect two out of three

trimesters or three out of four quarters. The mandatory term rotation approach had two versions, a quarter system and a continuous learning year cycling plan [pp.116-119].

Of these alternatives, the Commission most favored the continuous-learning-year version of the mandatory term rotation approach, although it was made explicit that the other two approaches were acceptable. The Commission further recommended that the Alberta Government "immediately ... establish a general time-frame for schooling in Alberta to facilitate continuity in student learning and wise use of public resources"[p.120]. This might lead to legislation of an entry point following a Christmas recess. However, to have a continuous learning year cycling scheme fully implemented, further impetus would have to be given along with an incentive grant structure. [pp.120-121].

3. Governance of Basic Education

a. Boards of Trustees. With provision for more autonomy by the recent School Act, the local boards of trustees were viewed as a mechanism for decentralization of authority. Their main involvement would be in the development of local policies and coordination of services and programs. The Commission further recommended the following: (1) teachers' eligibility for election to the board; (2) native student representation on governing

boards; (3) native trustees; (4) election of trustees by wards; and (5) the joint public-separate school board [pp.124-125].

b. School Councils. The Commission recommended that existing legislation be extended so that boards of trustees might be able to establish a school council for each school or group of schools. It was recommended further that school councils involve staff, students and parents and be granted authority and responsibility for specific aspects of school operation [pp.126-127].

4. Reorganization of Two Departments in Education

It was proposed that the Department of Advanced Education and the Department of Education share three common service units to be known as the Planning Unit, Support Services Unit, and Field Services Unit. It was also proposed that the efforts of the two departments be synchronized by means of a Coordinating Council[pp.132-138].

Based on a proposed theme of recurrent education and the interdependence among its various phases, the common service units were envisaged as a means to facilitate integration in a two-department system and to increase efficiency of operation [p.137].

The Coordinating Council was suggested as a provision for a more direct way to ensure that each of the two Departments be fully aware of what the other was doing. This council would be co-chaired by the two ministers of education and its membership might consist of the heads of the divisions and the common service units. Major responsibilities of the council would include "advising the two ministers with respect to priorities and other significant policy matters, arranging for implementation of government policies, and guiding the efforts of the service units" [p.138].

Analysis of Reactions

Table 7.1 summarizes initial reactions of the personnel of the Department of Education to selected proposals. The table indicates the overall reaction, together with some additional comments or conditions, of interviewees who were identified by code. The overall reaction represented the researcher's interpretation of the interviewee's response, whereas additional comments or conditions were either direct or paraphrased quotations. Not all proposals were reacted to by more than a single individual, in which cases overall reactions could not be compared. Of seven proposals that were reacted to by two or more individuals, four showed some degree of congruency in overall response. They included school

TABLE 7.1

INITIAL REACTIONS OF PERSONNEL OF DEPARTMENT OF EDUCATION TO SELECTED PROPOSALS

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
Planned Differentiation	B5	Questionable	The idea would be difficult to implement because of some anticipated problems in resources allocation.
	B1	Favorable	The idea was feasible and desirable in large cities where schools were many and population was dense. The idea should be experimented with before a full implementation.
- Community schools	B5	Favorable	
- Abolition of Attendance Areas	B5	Favorable	
Rural Education			
- I.D.P. Plan	B1	Favorable	Many people were forced to live in the city for employment reasons. The growth of the city under this condition causes the quality of city life to deteriorate. "We ought to maintain the rural communities as they now exist and even permit them to prosper and grow."

TABLE 7.1 (Continued)

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
Rural Education			
- Revamping School Boundaries	B1	Favorable	The resulting number of jurisdictions should not necessarily be twelve. The idea should be carefully studied and changes be made accordingly.
Separate Schools	B1	Favorable	A person's religion should not determine which school his children attend. Every parent should have freedom of choice. The two systems should cooperate in exchange of classes, services and students for mutual advantages.
School Year Reorganization	B4	Favorable	There would be a significant gain in any one of the three approaches. Advantage would be more visible in a more mature level of students who were inclined to work on a 12-month basis. In a year-round operation the student would be able to fit his program into the whole year; and he could drop out during any quarter of the year. Some difficulties were anticipated in regard to staffing and forecasting financial needs, especially for the first two years of implementation.

TABLE 7.1 (Continued)

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
			Costing could be done effectively on a quarterly basis as opposed to a yearly basis.
	B1	Favorable	Interviewee favored a plan for compulsory break at Christmas and regular attendance on a ten-month basis or less. Attendance should be optional during the break for remedial work or special interest classes.
			Interviewee disagreed with plans such as having 3/4 of students in school and 1/3 out of school at a certain time regardless of parents' choice.
			Interviewee preferred a divided school year scheme. Further comments were that (1) the only place for uniformity should be at Christmas, (2) other matters, such as dates of school opening and holidays, should be locally decided.
Governance of Basic Education:			
- Boards of Trustees	B1	Favorable	Interviewee agreed that they ought to develop local policies and provide local coordination.

TABLE 7.1 (Continued)

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
	B7	Not favorable	Boards of trustees was not protagonistic to education. An elected office was not able to handle problems facing education, not for lack of competency necessarily, but because of the interdependence of influences affecting education, many of which rest beyond the pale of the elector district. Representation could be achieved through other means than election, such as briefs, seminars and white papers. Interviewee preferred appointed representatives who were called upon to keep in close contact with the sensitivity of people. Elected boards had been detrimental on occasion to the teaching profession and to society. For instance, they became a barrier to teacher's opportunity for career advancement. Important decisions should not be left to elected boards unless they were an "enlightened constituency" of society that democracy could depend upon.

TABLE 7.1 (Continued)

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
- Teacher's Eligibility for election	B1,B7	Favorable	
	B1	Favorable	The government was prepared to see native trustees serving on school boards. Nothing was done because there was no agreement on the method of representation. When certain administrative difficulties were resolved, native trusteeship would become a reality.
	B7	Favorable	
- Joint Boards	B1	Questionable	In some cases joint boards while desirable might not be possible.
	B5	Questionable	The idea could not be tried until certain issues were settled in court.
	B7	Implementable	There were three groups that became influential: (1) those who were strongly opposed to separate boards, (2) those who saw an opportunity for cultural advantages in having joint boards, and (3) those who strongly believe in their religion but saw no longer need for a separate system. These groups were a thrust leading to a joint board.

TABLE 7.1 (Continued)

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
- School Councils	Several	Favorable	Interviewees saw councils as providing an opportunity for parents to participate in school matters. Councils should be granted authority and responsibility.
	B1	Favorable	The school councils could give parents a greater sense of being a part of the school system. Councils should be given a meaningful function and should concern themselves with substantial issues. Councils could become destructive if dominated by one or two members.
	B9	Favorable	Councils should have some executive decisions to make. School Boards should give up some of their power and authority to institute councils. The council's decisions would be under some automatic constraints such as budgets. These kinds of decisions would have to be made in close consultation with the principal or teacher representative.
	B7	Favorable	The council "invites parents back into the school and puts them in a talking relationship with children."

Table 7.1 (Continued)

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
	B5	Questionable	The council became another layer of government which increased problems and possibility of buck-passing.
			The council could become a continuous source of irritation for the school board in resource allocation.
			Conflicts could be generated between students and parents because of their different perceptions.
	B2	Unfavorable	The council could get involved in 'petty politics' such as interfering with teachers' personal affairs or abusing authority for personal benefits.
Reorganization of Two Departments in Education	Several	Favorable	Most interviewees agreed in principle with reorganization. They accepted or rejected certain specific recommendations.
- Branches and Coordinating Council	B2	Skeptical	The branches to be set up might lack sympathy or empathy with the public and have difficulties in communication.
			The Coordinating Council became a dominating group who controlled and arranged in decisionmaking.

TABLE 7.1 (Continued)

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
- Coordinating Council	B4	Favorable	Interviewee saw the merit of the Coordinating Council as a provision for avoiding duplication of services. Some coordinating procedures were necessary. For example, in adult education decisions should be made as to what branch should be responsible for it, what would be the role of elementary school system, and what would be the role of vocational education.
- Divisions	B7	Questionable	Interviewee saw both advantages and disadvantages in having four clear-cut divisions. Advantages were: (1) Separate divisions provided an opportunity for being independent and creative, and (2) separate units provided efficient division of labor and expansion of resources without work overload. Disadvantages were: (1) a danger of unnecessary diversity which might hinder articulation of the educational process, and (2) a tendency toward over-specialization which further fragmented the educational process.

TABLE 7.1 (Continued)

Proposal	Interviewee	Overall Reaction	Additional Comment or Condition
- Common Service Units	B6	Generally favorable	While being convinced that the idea was worth trying, interviewee anticipated difficulties in implementation. There were two reasons: (1) a possibility of no clear-cut channel and line of authority might give rise to duplication of services, and (2) a possibility that joint use of facilities and services might reduce autonomy of the four divisions.

Source: Interviews B1 through B9

year reorganization (favorable), teacher's eligibility for election (favorable), joint boards (mostly questionable), and school councils (mostly favorable). The remaining three proposals that were reacted to by two or more individuals received a divergence of opinions. Of the nine proposals reacted to by one individual each, seven appeared to be favorable and two questionable or doubtful. The latter two were proposals on the four divisions in the two Departments of Education and on the coordinating council. In sum, interviewees seemed to be in favor of eleven proposals and doubtful about two. The remaining three proposals received varying opinions.

Reactions to individual proposals are indicated in the paragraphs which follow.

1. Functions of Basic Education

a. Planned Differentiation. The community-school concept was generally endorsed, although there might be difficulty in financing the total scheme of planned differentiation. Feasible and desirable as planned differentiation might seem in urban areas, it was suggested that implementation be done experimentally.

b. Rural Education. A response from an official seemed in favour of the IPD Plan and the revamping of school system boundaries, although he

suggested careful study and necessary change before implementation.

c. Separate Schools. A Department official concurred in the proposals that separate schools be permitted to organize themselves, that parents have freedom to choose schools for their children, and that there be provision for student exchange between public and separate school systems.

2. School Year Reorganization

The CEP proposed three alternatives to school year reorganization -- divided school year, voluntary term rotation and mandatory term rotation -- with preference on the last approach. The responses of two officials were generally in favor of a reorganization but they indicated no agreement on a specific approach. One of the two officials anticipated some difficulties in staffing and estimating financial needs.

3. Governance of Basic Education

a. Boards of Trustees. The retention of the boards was favorable to one official but unfavorable to another. The opposition stemmed from the view that the board might become detrimental to the teaching profession and to society in general. Concerning teacher's eligibility for election to the board, there seemed to be

no objection. The two officials also concurred in the concept of native trusteeship. With respect to the joint-separate school board, implementation was predicted, though not as a province-wide occurrence.

b. School Councils. The concept was favorable to some Department officials who agreed that the council should be granted authority and responsibility. However, there appeared to be some disadvantages in this concept, for example, it added another layer to government and it might become destructive when dominated by a few members.

4. Reorganization of the Two Departments in Education

It was proposed that the two Departments of Education share three common service units -- Planning, Support Services, and Field Services -- meanwhile maintaining relationship through a Coordinating Council.

The total concept of reorganization did not seem to receive opposition, although some disadvantages were indicated, such as communication difficulties. The Coordinating Council was thought to solve this problem in part. Yet there existed the problem of articulation of the educational process which could arise out of the clearcut division between the four units corresponding to the four phases of education. There was also some

doubt about the possibility of implementing the three common service units, for the structure seemed to impose "adhocracy" and provided no clear-cut line of authority.

REACTIONS BY SELECTED GROUPS

This section is an examination of the reactions of selected groups to the Commission's proposals. Since the investigation was only exploratory, not all briefs and submissions were studied. Included were two major interest groups: the Alberta Teachers' Association (ATA) and the Alberta School Trustees' Association (ASTA). Of specific interest to this study were their responses to the 'top-ten' recommendations which are reported in the next part. The last groups whose responses were studied constituted a small fraction of the total number of groups to which they belonged. They represented such interest groups as school boards, home and school associations, and the principals' associations. Several groups such as the chambers of commerce and institutions of higher education were excluded in order to make this part of the study manageable.

Reactions by the Alberta Teachers' Association

In their response to the CEP report, the ATA established an ad hoc committee "... to study the report in depth, to recommend on Association reactions and to

prepare submissions to government" [ATA, 1972:2]. The procedure which this ad hoc committee followed may be summarized as consisting of six steps:

1. Prior to the release of the CEP report, committee members "familiarized themselves with the inputs, procedures and personnel of the Commission on Educational Planning [p.2];

2. During summer 1972 the committee held a four-day meeting during which they studied the report and identified 233 recommendations as directly concerned with the ATA; 47 of these recommendations were marked as directly relating to the 'top-ten' proposals;

3. "The Committee then compared the recommendations with current ATA policy and produced them in a booklet" [p.2];

4. The booklet was distributed to teacher study groups throughout Alberta, along with prepared response sheets;

5. Responses from teacher study groups were received and analyzed;

6. The views of teacher study groups, the ad hoc committee, and the Provincial Executive Council of the ATA were consolidated in the form of two submissions -- the one specifically on the 'top-ten' proposals and the other on other recommendations.

The responses to the 'top-ten' proposals are summarized in Table 7.2.

The Association supported most of the 'top-ten' proposals at least in principle. In all cases it recommended some conditions to be met or incorporated upon implementation. In two instances -- proposals 6

TABLE 7.2

SUMMARY OF THE A.T.A.'S REACTIONS TO THE 'TOP-TEN' PROPOSALS

Proposal	Overall Reaction	Additional Comment or Condition
1. Early Education	Supported	Programs should be operated only in schools by school boards under the direction of qualified teachers.
2. Abolition of Departmental Examinations	Supported	University entrance examinations and regional examinations should be discouraged.
3. Alberta Academy, Early Ed and ACCESS	Supported	A televised learning package for pre-school programs should not be introduced until later.
4. Further Education	Supported	Further and lifelong education should not be operated at the expense of basic education.
5. Certification Requirements for Teachers	Supported in Part	The association was ready to take over the responsibility for certification. There was strong support for an extended practicum. There was strong opposition to the abolition of permanent certification and to limited term administrative appointments.

TABLE 7.2 (Continued)

Proposal	Overall Reaction	Additional Comment or Condition
6. Reorganization of Departments in Education	Reserved	The Association was in favor of the concept of the Planning Unit, but was opposed to the establishment of a research and development board as an arm of government.
7. Funding arrangements	Supported in part	The Association was opposed to start-in-life non-repayable grants, and recommended that this concept receive further study.
		Greater funding of elementary education should not be at the expense of high school grants.
8. School Year and Transfer of Credits	Supported with specifications	The Association endorsed the concept of a quarter system approach, with some additional basic principles regarding student days, summer, teacher salary, curriculum, etc.
9. Reduction in Length of First-Degree Programs	Reserved	The Association advocated a four-year teacher education program which incorporated internship or extended practicum.
10. IPD Plan	Supported with some reservations	The Association recommended further study of the idea.

Source: ATA, 1972, pp.5-14.

and 9 -- the Association reserved the right to express opinions on the overall issues since they were outside its territory.

Finally, the Association proposed that five of the ten recommendations be implemented by the government at an early date. Without ranking, they were specified as follows:

> Provision of universal opportunity and selective experience in early education.
>
> Abolition of Grade XII departmental examinations.
>
> Inauguration of the Alberta Academy and the supporting ACCESS network.
>
> Modification of certification requirements for teachers in early and basic education: four years' preservice preparation including an extended practicum and transfer of responsibilities for certification and decertification to the Association.
>
> Revision of funding arrangements for all levels of recurrent education, including provisions for life experience and student assistance [ATA, 1972: p.16].

In summary, the submission by the ATA indicated that it was strongly in favour of Proposal Numbers 1, 2, 3, 5, and 7; endorsed Proposal Numbers 4, 8 and 10; and neither favored nor rejected Proposals 6 and 9.

Reactions by the Alberta School Trustees' Association (ASTA)

The ASTA represents another group with a large

TABLE 7.3

SUMMARY OF THE A.S.T.A.'S REACTIONS TO THE 'TOP-TEN' PROPOSALS

Proposal	Overall Reaction	Additional Comment or Condition
1. Early Education	Agreement	School systems were suggested as logical agencies to coordinate and offer programs.
		Parents would be educated and teachers were to be specially trained.
		Pupils' advancement should be at their own rates and should be assessed by the community.
2. Abolition of Departmental Examinations	Conditional Agreement	Universities and other post-secondary institutions should accept the sending institutions' evaluation for admittance purposes.
		Subject exams and power tests should be administered periodically to assess growth.
		School boards should have the right to decide on a school leaving exam.
3. Alberta Academy, Early Ed, and ACCESS	Partial Agreement	Alberta Academy: Direct benefits to basic education were thought to be minimal whereas 'spin-off's' would be varied and greater.

TABLE 7.3 (Continued)

Proposal	Overall Reaction	Additional Comment or Condition
		ACCESS: First priority should be to support early childhood education; however, a certain amount should be provided for parents.
		There should be some assurance that all geographic areas were exposed to programs.
		It was recommended that first priority be given to early and basic education in considering innovations.
4. Further Education	Agreement	School boards should be agency of concern. Present facilities should be made greater use of by coordination and participation.
5. Certification Requirements for Teachers.	General Disagreement	Control of licensing should remain in the legislature.
		Permanent certification should be abolished, teachers should be evaluated periodically, and administrators should be appointed on a limited term basis -- preferably 5 years.
		School boards should retain the function of evaluating teacher's competency.

TABLE 7.3 (Continued)

Proposals	Overall Reaction	Additional Comment or Condition
6. Reorganization of Departments in Education	Disagreement	Two departments tended to inhibit articulation and coordination. Reorganization should be on an interim basis. Alberta Educational Council was supported as a continuation of the CEP on evaluation, contracted research, and information.
7. Funding Arrangements	Agreement	Operational expenditures should be budgeted on a three year basis, whereas capital costs should be on a five-year basis. All governing bodies should operate on a common fiscal year.
8. School Year and Transfer of Credits	Agreement	None
9. Reduction in Length of First-Degree Program	Agreement	Specialization should begin at high school. There should be one semester of classroom practicum for teacher education.
10. IPD Plan	Conditional Agreement	Centralization would increase and small community would disappear. It was conceived to be incompatible with the community school concept. This would remove local autonomy of communities.

Source: A.S.T.A., 1972.

membership. The reactions by this group to the 'top-ten' proposals are summarized in Table 7.3.

The analysis indicated that the ASTA was in support of most of the 'top-ten' proposals, at least conditionally or partially. Only two of these -- 5 and 6 -- appeared to be unacceptable for the ASTA.

Reactions by Some Other Groups

The groups included in this part of the study constituted a small fraction of all groups who made submissions to the Cabinet Committee on Education. Their names appear in the following list:

(1) Brentwood Home and School Association

(2) Calgary Christian School Board

(3) Calgary Public School District, Senior High School Principals' Association.

(4) Calgary School Board, Physical Education Department.

(5) County of Camrose, School Committee

(6) Civil Service Association of Alberta

(7) Lethbridge Council, Alberta Federation of Home and School Associations.

(8) County of Strathcona, Principals' Association.

(9) St. Paul Regional High School District No.1

(10) Three Hills School Division No.60, Principals' Association

Before the reactions of these groups are described, some general observations are in order:

(1) Only two of these groups chose to react to the 'top-ten' proposals (Numbers 3 and 10 on the list), while the other eight groups did not react to the 'top-ten' proposals at all or reacted to very few of them.

(2) Most of these groups indicated their agreement or disagreement with the proposals that they chose to react to. They also submitted further recommendations or conditions regarding these proposals.

(3) One of these groups (Number 10) reported the count of votes taken on each proposal and then summarized the state of reaction for each proposal based on the vote count.

The reactions of these sampled groups may be summarized as follows:

The 'Top-Ten' Proposals. Most of the few groups who chose to react to these proposals tended to support them, at least in principle. Recommendation 1 on early childhood education received most enthusiastic support by these groups. Another proposal which was highly favorable was school year reorganization, although there was minor opposition. Two proposals which were yet

to be reconsidered were the ones on the Alberta Academy and the Integrated Provincial Development Plan. All the remaining proposals received varying degrees of support, but not all were without opposition.

School Councils. Of the six groups who reacted to the concept, four disagreed while two agreed. Those groups who were opposed to it felt that the council would increase the number of decision-makers and at the same time increase the politics of education (Group 3). There were also problems of cost, coordination and pressure groups (Group 8). Some groups felt that dual responsibilities and authorities would not work (Group 9). Another group suggested that institution of the council be a local prerogative and not compelled by legislation (Group 3). Only one group strongly supported this concept (Group 10).

Educational Finance. One significant recommendation agreed upon was the employing of bases additional to and other than real property tax, such as sales tax and student fees, to finance education (5). Another suggestion was to put more control on the cost of education, such as the reduction of administrative costs (9). A group disagreed with the recommendation on the implementation of PPBES and PAB on the ground that cost was not the only variable in decision-making; there

were other elements such as the human element (5). The idea of equalizing opportunities was agreeable to one group (6) and led another group to reject financial support for private schools (2). One of these groups made a recommendation that emphasis should be placed on financial assistance to early and further educational plans(1).

Other Recommendations. Responses of these groups to other recommendations were so divergent and their viewpoints differed so markedly that they could not be totally covered in this study. A general impression was that there were some recommendations which were acceptable to some of these groups whereas other recommendations were unacceptable to other groups. Whether or not these recommendations were acceptable, further suggestions or conditions were generally provided.

SUMMARY AND DISCUSSION

This chapter examines professional and public reactions to the CEP recommendations. Groups included for the study were personnel of the Department of Education, the Alberta Teachers' Association (ATA), the Alberta School Trustees' Association (ASTA), and ten other selected groups.

Reactions by Personnel of the Department of Education

Of some sixteen selected proposals, nine were reacted to by one individual each, and seven were reacted to by two or more individuals. Interviewees seemed favorable to eleven of these proposals. The remaining five proposals either received divergent views or were opposed. Personnel indicated reactions by making comments or suggesting conditions with respect to these proposals.

Reactions by Selected Groups

The groups chosen were the ATA, the ASTA, and ten other groups. Their reactions are summarized as follows:

1. The ATA's Reactions to the 'Top-Ten' Proposals

The ATA established an ad hoc committee to study the report and identify major recommendations. The committee then compared these recommendations with the ATA policy, produced a booklet, and had the booklet distributed to teacher study groups throughout the province. The views of the association and its membership were thus formulated. In summary, their views were in support of Recommendations 1, 2, 3, 4, and 5, and were in partial support of Recommendations 7, 8, and 10. They reserved the right to decide on Recommendations 6 and 9. The association further recommended that Proposals 1, 2, 3,

5, and 7 be implemented at an early date.

2. The ASTA's Reactions to the 'Top-Ten' Proposals

The analysis indicated that the ASTA was in complete agreement with Proposals 1, 4, 7, 8, and 9; in partial or conditional agreement with Proposals 2, 3, and 10; and in disagreement with Proposals 5 and 6.

3. The Reactions by Some Other Groups

a. The 'Top-Ten' Proposals. Of the few groups who reacted to these proposals, most tended to be in support at least in principle. Early childhood education and school year reorganization were the two most highly favorable proposals.

b. School Councils. The concept seemed to be unfavorable to the groups who expressed an opinion.

c. Educational Finance. Many groups agreed with the employing of additional tax bases other than property tax, and with the idea of equalizing opportunities. There was a suggestion of putting more control on the cost of education.

d. Other Recommendations. Responses to other recommendations were so diverse that a summarized statement was impossible to make.

Initial reactions by some personnel of the Department of Education did not seem adequate to provide grounds for generalization of opinions on all selected proposals. Only seven out of sixteen recommendations were reacted to by two or more individuals. Two factors were involved in the inadequacy of these reactions. First was the time factor. The interview period normally ranged from 1-1/4 to 1-3/4 hours, more than half of which was devoted to questions associated with the structures and procedures of planning. The interviewees, therefore, had less than half of the time for expressing their views on the CEP recommendations. The entire period, while appearing to be short for the investigator, was demanding for those being interviewed. The second factor was concerned with the hesitation of some interviewees to advance their opinions. There was a tendency to avoid controversial topics. At that stage it was generally felt premature for departmental officials to disclose their views. However, many officials were willing to respond. The opinions gathered from the interviews represented only those who expressed them and did not represent official opinions of the Department of Education.

Four of the seven recommendations that were reacted to by two or more individuals showed some degree of consistency. Some of them may be compared with

decisions by the Department at a later stage. School-year reorganization was agreeable to some interviewees, but the Department announced that it was still premature to take action [See Chapter 6]. A teacher's eligibility for election to a board of trustees seemed agreeable to some interviewees, but the Department did not accept this proposal [Cabinet Committee on Education, 1973b: p.iii]. The establishment of a joint public-separate school board appeared questionable to some interviewees; however, the Department would neither force nor prevent joint arrangements [Cabinet Committee on Education, 1973b: p.iii]. The establishment of a school council, while agreeable to some interviewees, would require more study by the Department [Cabinet Committee on Education, 1973b; p.iii]. Disagreement between the views of some individuals and the Department of Education in which they serve reinforces an earlier notion that the opinions gathered from the interviews were representative only of those who expressed them. Unofficial statements such as these did not correlate well with official actions of the Department.

Reactions from the ATA seemed to correlate well with the action taken by the government. The ATA was in favor of proposals 1, 2, 3, 5, and 7, of the ten top-priority proposals. As of the date of this study, the

Department of Education has implenented proposals 1, 2, and 5, at least in part [Alberta Hansard, 1973: p.1536]. Meanwhile the Department of Advanced Education is implementing proposal 3, at least in part. Proposal 7 is still under study [Cabinet Committee on Education, 1973b: pp.5 and 10]. It may well be that the ATA was one of the most influential groups with respect to the work of the CEP. If that was the case, two factors must have contributed to such influence. The first factor was the involvement of the Executive Secretary in the work of the CEP. The second factor was the procedure through which the ATA elicited from its membership responses to the CEP's recommendations.

The ASTA is another large group in Education. In general, the reactions by this group seemed to be in congruence with the action taken by the two Departments in Education. There was congruence with respect to proposals 1 and 7, to some extent 2 and 3, but none with respect to 5. In other words, the degree of congruence was not as high as that between the ATA's reactions and the action of the two Departments.

The sample of opinions was too small to indicate the possibility of implementation of selected proposals. Only one of the proposals -- early education -- received strong support by all groups. The examination of the

opinions, however, did indicate divergence among reactions to the recommendations by the CEP. An objective analysis of these reactions is indeed a very difficult task. A lesson one learns is that, while the machinery for assessing responses to recommendations may be well designed and promising, the substance of the responses may impose difficulty. The ultimate task of the monitoring machinery is to make decisions on the recommendations in the light of diverse and divergent opinions. Therefore, there is a premium when decisions are acceptable to all parties. This means that decisions must not only be politically acceptable, but also administratively and technically feasible.

Chapter 8

SUMMARY, CONCLUSIONS AND IMPLICATIONS

This chapter contains a summary of the four main descriptive chapters, conclusions derived from these chapters, and implications of the study. It also gives suggestions on further related research.

SUMMARY

This study examined educational planning at the provincial level in Alberta. Special focus was placed upon educational planning at the Alberta Department of Education and the mechanisms of planning used and suggested by the Alberta Commission on Educational Planning (CEP). The study also looked at factors leading to a reconsideration of educational planning in Alberta, the outcomes of the CEP, machinery for assessing professional and public reactions to some of these outcomes, and some reactions to selected recommendations.

Educational Planning at Alberta Department of Education

Structure of Planning. The organization of the Alberta Department of Education consisted of the Minister, the Deputy Minister, the Associate Deputy Minister, and the Directors of ten branches. Emerging in this structure was the Directors' Council which performed the functions

of coordinating the activities of the branches and which became involved in policy and program considerations. The planning activity of the Department occurred at five levels: political, departmental, divisional, branch and program. These levels were not formally designated and the conceptualization of their existence varied from one individual to another. Planning in the Alberta Department was not a formalized activity and had no planned structure.

Procedure of Planning. The procedure of planning at the Department was described by most interviewees as consisting of initiation, feasibility consideration, procedural determination, field testing, and implementation. Initiation of ideas could come from any source, within or outside of the Department, while feasibility consideration mainly involved the Directors' Council. Procedural determination might involve this group, but was normally assigned to a specific branch or to several branches, following the Minister's approval to proceed. Field testing involved sounding out public opinion and actual trial of pilot projects. The result of field testing could be either adoption or rejection of the particular proposal.

Nature and Characteristics of Planning. The planning process at the Department was described as a

reactive model; there was no master plan as a source of minor plans and projects. Planning was not an explicit and formal function and the responsibility for it was shared by individuals in strategic positions and with particular interests. Participation came from major interest groups in the province as well as some individuals inside and outside the Department. Nearly twenty advisory committees and boards provided an avenue for a variety of input into the Department's activity. The operation of the Department was not dictated by any specific approach, although the social demand approach gave the main impetus seconded by the manpower demand approach. The time line for planning was relatively short -- one to three years.

Strengths and Shortcomings of Existing Mechanisms. The Directors' Council made it possible to plan cohesively while extending the scope and perspective of planning activities. A built-in evaluation component was another strength. Moreover, the present scheme was sensitive to problems, but not overly sensitive. Finally, the Minister's insistence on consideration of all possible alternatives and their effectiveness was an additional strength.

On the other hand, there appeared to be some shortcomings. The Directors' Council was limited by two

factors: inability to give clear directions and the supremacy of time over issues. Also, there was a lack of research activity especially in evaluation of alternatives and innovations. The present scheme tended to put the "planners" too close to the problem and information sources to take an objective view of the problems. Furthermore, there appeared to be a lack of widespread participation by other government departments.

Factors Leading to Reconsideration of Educational Planning

Educational Issues Between 1965-69. Four major issues fell under criticism during this period: curriculum and instruction, educational costs, organization and structure of post-secondary education, and centralization versus decentralization of control.

Recommendations of the Cameron Commission. The report of the Cameron Commission recommended the establishment of a Royal Commission on Educational Planning. This Royal Commission was to be charged with the responsibility of identifying and determining ways to satisfy educational needs of the province by the use of certain procedures such as public hearings and research studies.

Factors Leading to the Establishment of the CEP. The initiative for establishing a commission on educational planning came from a group of young men in the

Social Credit Party during a province-wide leadership campaign in 1969. The idea was partially influenced by the Hall-Dennis Report in Ontario in 1968. An important factor which made a planning commission become a reality was the Deputy Minister's experience with the operation of the Organization for Economic Co-operation and Development (OECD) in Europe. By the Minister's accord, the Deputy Minister in consultation with a few others drew up the terms of reference for the Alberta Commission on Educational Planning which became inaugurated by Order-in-Council, June 26, 1969.

Alberta Commission on Educational Planning (CEP)

Between 1969-72, the CEP existed as a hybrid of educational planning and policy-recommendation for the Province of Alberta. It was charged with the responsibilities of (1) projecting the societal and individual needs in Alberta during the ensuing two decades, (2) recommending measures to satisfy these needs through the educational system, (3) proposing bases for priority judgments in educational policies, and (4) considering permanent mechanisms for planning and policymaking in education.

The responsibilities for the CEP were assumed by a single Commissioner who in turn recruited additional staff, formed a Commission Board of nine members

(including himself), and established three task forces with ten to twelve members each. The Commission had gained access to the Human Resources Research Council (HRRC) as a source of continuing research capability.

Organizational Structure. The Commission consisted of six important components: the Commissioner, the Commission Board, the Support Staff, the Executive Staff, the Task Forces, and the Projects. The Commission Board as a group performed a reactionary role in relation to the Commissioner. The Board's involvement included defining policies and procedures, coordinating activities, analyzing information and proposals, and reacting to the Commission Report during its development. The Task Forces consisted of three groups formed to consider the N-12 system, post-secondary education, and lifelong education. Each of the task forces studied in depth the existing practice of each of these forms of education, evaluated their alternative futures, and proposed guidelines for future development. The Projects were the activities designed to gather information relevant to the Commission's mandate. They included submissions, public hearings, position papers, research studies, conferences, and review panels.

Personnel and Individual Responsibilities. The membership of the Commission Board provided an approximate

balance between professionals and laymen. The generally high income level of these members indicated their high socio-economic status. The criteria for selecting the members were a mixture of representativeness, qualification, experience, reputation, career success, and personal quality. Responsibilities of the individual members were related mainly to leadership and liaison roles, with two or three members performing an additional function. The leadership role involved the Commission Board members in major activities such as task forces and public hearings, whereas the liaison role required continuous contact with various groups, organizations, and institutions.

Design of Activities. The activities of the CEP fall into three categories: research studies, public involvement, and correlative projects. Research studies included nine investigations of planning procedures, eleven position papers, four studies on images of the future, and seven studies on specific topics. Public involvement included well over 300 submissions, thirty-six public hearings, eleven one-day conferences, "A Congress on the Future," three seminars, countless meetings, and a considerable volume of correspondence, conversation, and consultation. Correlative projects were assigned to three task forces which prepared interim

proposals for debate and appraisal. The Commission Board itself was a mechanism for the synthesis of ideas throughout the Commission's operation.

Procedures for Planning Activities. The few meetings of the Commission Board were spent on designing specific tasks and setting target dates for them. A PERT chart was developed, showing seven activities together with particular events and the time lines for them. Major activities included development of a social account, studies of planning procedures, preparation of position papers on educational elements, task forces, public involvement and conferences, and development of a Commission report. The first three activities were carried out by the Human Resources Research Council; the fourth was undertaken by experts in the fields; and the last three were the prime concern of the Commission Board members collectively and as individuals.

Final Outcomes. The final outcomes of the CEP were recommendations contained in its report which was entitled A Choice of Futures.

To fulfil the mandate of establishing bases for priority judgments for education during the decade to come, the Commission proposed a set of ten priorities to be decided upon by the public, interest groups,

institutions, and to be finalized by the government. Examples of these recommendations are exclusion of provisions for early childhood education, abolition of Grade XII departmental examination, and reorganization of the two Departments in Education.

The Commission suggested a systems approach for educational planning in Alberta. The educational system was to be composed of four basic elements: resource inputs, transaction, personal and social outputs, and planning plus research and development. The planning process envisioned was to consist of five phases: identifying goals, evaluating alternatives, allocating resources, and monitoring operations.

The two Departments in Education were to share a planning unit. The unit was to perform a service-advisory role, mainly in the identification of alternatives, together with the assessment of their implications and cross-impacts. It was recommended that the unit perform six functions such as gathering information about needs and problems and identifying goals and priorities. The unit was to be charged with nine specific tasks such as interpreting manpower needs and appraising learning resources.

At the local level, participatory planning was

suggested. This concept referred to planning by the institution, the group of learners, and the individual learners. Regional planning was another level of planning recommended for all types of communities.

Machinery for Evaluation of Reactions to CEP's Recommendations

Reporting and Informing Strategies. The report of the CEP was designed to incorporate the reporting and informing strategies. Besides, a public information program was conducted which included such activities as prime-time telecasts.

Cabinet Committee on Education. The Cabinet Committee on Education undertook the Choice of Futures Project in an attempt to solicit reactions to the CEP recommendations. In the first phase, the Committee became involved in a publicity campaign to stimulate public responsiveness. In the second phase, it studied and assessed reactions from organizations, groups and individuals. Affected departments and branches were then requested to assess reactions that were addressed to them, and to incorporate these reactions in policy changes. The last phase of the project involved the report on decisions of the posture of government with respect to specific recommendations contained in the CEP's report. The Committee, however, continued to function as a monitoring device for the government.

Reactions to the CEP's Recommendations

Initial Reactions by the Personnel of the Department of Education

Functions of Basic Education. Planned differentiation might pose some difficulty in implementation; therefore, it should be experimented with first. The community-school concept was generally an acceptable part of the planned differentiation. In rural areas, the concepts of an integrated provincial development plan and revamping school boundaries seemed favorable. Endorsed also were freedom of separate schools to organize, freedom of parents to choose schools for their own children, and a provision for student exchange between public and separate systems.

School Year Reorganization. The responses were generally in favor of a reorganization of some sort. There was no agreement on any specific approach.

Governance of Basic Education. There was no agreement on the retention of boards of trustees because these seemed to be both advantageous and disadvantageous. Teacher's eligibility for election to school boards was not found to be objectionable. Neither was the concept of native trusteeship. The joint public-separate school board, it was predicted, might well be implemented in certain geographical areas. The concept of school councils

seemed generally acceptable, although there appeared to be some disadvantages.

Reorganization of two Departments in Education. The total concept of reorganization did not seem to receive opposition, although there might be the problem of articulation arising from separate units and the difficulty of implementing the three common service units.

Responses by the ATA. The assembled views of the executive and membership of the ATA were in support of proposals 1, 2, 3, 4, and 5 of the 'top-ten' recommendations suggested by the CEP, and were in partial support of proposals 7, 8, and 10. They neither agreed nor disagreed with recommendations 6 and 9. The ATA chose numbers 1, 2, 3, 5, and 7 as having top priority for early implementation.

Responses by the ASTA. The ASTA was in strong agreement with proposals 1, 4, 7, 8, and 9; in partial or conditional agreement with 2, 3, and 10; and in disagreement with 5 and 6.

Responses by Some Other Groups. With respect to the 'top-ten' priority recommendations some of these groups tended to be in support at least in principle. Early childhood education and school year reorganization were the two most favored proposals. With respect to

school councils, the concept seemed favorable to the two groups who expressed an opinion. Concerning educational finance, many groups agreed with expanding the tax base to other than real property tax. The idea of equalizing opportunities was also endorsed, but the groups would like to see more control of educational costs, especially on expenditures related to administration. Responses to other recommendations were too diverse to reduce to a single or to a few summarized statements.

CONCLUSIONS

An ideal situation for educational planning in Alberta would be the existence of a separate body for continuous and formal planning endeavors that included all levels and all forms of education. The only one agency which came close to this was the Alberta Commission on Educational Planning but its mandate lasted for only three-and-a-half years. Thus it cannot be considered a fullfledged planning unit for Alberta education. Non-formal planning, meanwhile, took place in the Department of Education, although it was not the only organization that looked after educational matters. The study excluded all other departments and agencies having to do with specific aspects and levels of education; therefore, conclusions apply exclusively to non-formal planning activities at

the Department of Education.

Non-formal educational planning at the Department had no designated structures and processes. Planning involved employees of the Department and members of advisory groups to the Department, although it was not necessary that the initiator be fully engaged in the process. The Department had an identifiable component called the Directors' Council acting as the internal advisory board to the Minister. The Directors' Council played a major role in policy and program consideration, especially at the feasibility study stage. Wherever the idea was initiated, it would find its way to the Directors' Council for feasibility consideration in the light of cost, effectiveness and overall policy. This does not mean that the Council had decision-making authority, for the final decision on all matters resided in the Minister. Typically all matters, after consideration by the Council, were taken by the Deputy Minister to the Minister for approval. Approved projects or programs were then sent down to the Directors' Council for procedural determination, although this was not always the case for some projects or programs might be referred to the originating branch. A general observation was that the planning procedures at the Department were innovation-oriented as indicated by the five stages of operation.

Educational planning at the Department of Education was described as reactive and incremental; that is, the planning endeavor was directed toward solutions of existing problems and incorporated emerging trends. There was no denial that social, economic, political, and several other factors were influential to Alberta education, but educational planning at the Department was not explicitly confined to any single planning approach that encompassed one or more of these factors. Implicitly, however, there was a significant influence of the social demand approach seconded by the manpower demand approach, although the latter was not so obvious. There was no identifiable master plan, except plans that correspond to incremental needs as a matter of course. There appeared to be no organized effort to forecast future developments, to identify future problems, and to determine future alternative courses of action in the light of the totality of education, at least pertaining to those phases and forms under the Department's direct responsibility. Most plans, projects or programs rarely extended beyond one to three years, were normally restricted by the budget, and were concerned exclusively with education in a narrow sense.

There was a contention that the planning mechanisms at the Department were satisfactory under current

circumstances. Informal planning structures and processes had certain advantages. Disadvantages did not appear too serious for the present situation, perhaps because Alberta was economically and socially well developed and thus was able to finance education generously, especially its innovative projects. Moreover, the opinion of the public and interest groups was not limited by any political factors and always had its effect on the educational system. In the minds of professionals and laymen, therefore, there appeared to be no excessive dissatisfaction with the present machinery of planning at the Department.

Formal educational planning during 1969-72 was undertaken by the Alberta Commission on Education Planning. The idea for institutionalizing formal planning came from several sources. Indirect sources were certain educational issues under attack during the sixties together with recommendations on a continuing Royal Commission for Planning made by the previous Royal Commission on Education. A more direct source was an initiative from a group of young politicians during the leadership campaign of the Social Credit Party. Besides these factors, the OECD in Europe exerted significant impact on the implementation of the idea for planning at a later stage, especially with respect to scope and orientation. This impact was

reflected in the terms of reference provided by the Order-in-Council as guidelines for the operation of the CEP. The person who was involved in preparing the terms of reference had participated in many consecutive annual meetings sponsored by the OECD. Undoubtedly, he put certain ideas about planning from these meetings into the framework within which the CEP operated.

Formal educational planning carried out by the CEP employed some unique structures and processes. The organizational structure was not that of a planning unit, but was likened to an autonomous Royal Commission. It was unique in that it had a single commissioner who was given authority to enlist assistance from other organizations in Alberta. The CEP had its own office and personnel, but the undertaking of mandatory activities was accomplished through loaned persons. As a consequence, its working procedure was different from that of all other recognized planning units and from that of other Royal Commissions.

The CEP essentially performed a dual function. First, it recommended policies and plans for the educational system; that is, it operated as a planning agency. Second, it suggested permanent structures and processes for educational planning in Alberta; that is, it proposed a plan for educational planning. Therefore, it can be

viewed as performing a function of bridging the gap between the present and the future systems in educational planning.

The accomplishment of the CEP was in part due to research capabilities provided by the Human Resources Research Council, and in part due to educational experts from higher education institutions who prepared their respective position papers. The success was also attributed to the Commission Board members who performed several strategic roles. They were responsible for the three task forces as chairmen or co-chairmen, and participated in the conduct of public hearings. They also established liaison with other agencies and interest groups. Last but not least in importance was their concerted effort in designing the activities of the CEP, outlining the report framework and strategies, and synthesizing ideas from research studies, position papers, task force reports, interest groups and the public into a final report.

The Commission's report, entitled A Choice of Futures, was not the finalized policy and master plan. The government had yet to sound out the opinion of various departments, educational institutions, interest groups, and public at large. In a democratic regime like Alberta, it became the practice to assess the voices of these

groups before implementing the recommendations of a Royal Commission.

In the case of the recommendations of the Alberta Commission on Educational Planning, the body which assessed the voices of various groups and individuals was the Cabinet Committee on Education. This Committee undertook the Choice of Futures Project as soon as the mandate of the Alberta Commission on Educational Planning terminated. During the period of its operation, the Committee received and evaluated hundreds of briefs, submissions and letters. The opinions contained in these briefs, submissions and letters were incorporated in policy determination by the two Departments of Education including their branches. Some major recommendations of the Alberta Commission on Educational Planning were implemented at least in part, others received further study, and many were rejected. The Cabinet Committee on Education, therefore, may be considered as part of the machinery for educational planning in Alberta during the last few years.

The substance of responses to the recommendations of the Alberta Commission on Educational Planning, such as the initial reactions by departmental personnel and the submission of the Alberta Teachers' Association, revealed the attitudes of these individuals and groups

toward certain recommendations. While the data were not adequate for prediction of implementation of specific recommendations, they did indicate the sources and nature of opinions that were incorporated.

IMPLICATIONS

The dual function of the Alberta Commission on Educational Planning in bridging the gap between the old and the new educational planning mechanisms has terminated. However, implementation of recommendations to accomplish the task of continuing to bridge such a gap has yet to come. The Cabinet Committee on Education so far has, to some extent, contributed to a fulfillment of this task. Some major recommendations have been implemented. They should provide a start in the direction that is desirable for task fulfillment. However, it will take time for total accomplishment In the case of the Royal Commission on Education (1959), some of the recommendations received resistance from departmental employees and lacked organizational as well as public support. It is speculated that this may be the case also for the recommendations by the Alberta Commission on Educational Planning.

This study seems to imply that the success of the CEP depended on several factors. It depended on the degree of democracy, the level of education attained by the

population, public responsiveness to change and development, and public willingness to participate or express opinions. The use of the recommendations of the CEP for educational change offers two advantages: the ability to take a different and broader perspective of the circumstances and the ability to make independent, objective suggestions. Some disadvantages are also present, such as a lack of built-in research capabilities and dependence on the political party currently in power. It was implied in this study that the Commissioner significantly contributed to the success of the CEP. Evidences were his ability to organize and orchestrate the activities of the CEP, to compromise and select ideas for the report, and to acquire cooperation of the government in seeing that some major recommendations be implemented. Recently he became Deputy-Minister of the Department of Advanced Education. His position thus increased the likelihood of the implementation of the CEP recommendations.

The framers of CEP recommendations were sensitive to political factors. The CEP was created by the previous government, its work was completed and submitted to the present government, and the implementation of its recommendations will be done, if at all, either by this government or other governments in the future. In a situation like this, strong arguments advanced by the

CEP alone are not adequate. Implementation of these recommendations will have to be justified on political grounds. On the one hand, the public has a high degree of power in that it can express demands through public hearings and submissions as well as through the election of governments. On the other hand, the civil service has a high degree of power in that it has technical know-how, formulates as well as initiates structures, and gets involved in process. Therefore, a balance between the two groups has to be maintained in government's considerations for implementation.

While the recommendations are being determined on the basis of political factors, administrative and technical aspects of these recommendations cannot be ignored. For example, an interdepartmental coordinating council poses a membership problem. Should membership consist of the division heads and of the common service units? Or should it consist of representatives from branches within divisions as well as representatives from the common service units and from the other three boards under the Coordinating Council. This is a question of who should get involved in advising with respect to priorities and policies on behalf of the two Departments in Education. Implied is also the problem of the formal procedure under which the Coordinating Council will

operate, such as the objectives, the type of issues, and the stages of operation. Of importance is the major role of the Coordinating Council -- whether a reactionary role, an initiative role, a directive role, or an executive role.

The future of educational planning in Alberta depends largely upon the implementation of the CEP recommendations. Several questions are involved. First, how thoroughly the recommendations relevant to planning are considered and weighed in the light of their advantages and disadvantages? Second, how many groups give their thought to these recommendations? Third, what methods are used in synthesizing opinion from various groups? And fourth, are these recommendations implemented in whole, in part, or subjected to some compromised conditions? These questions have direct bearing upon the structures, processes and effectiveness of the planning endeavor. They also have direct bearing upon the organizational structure of the educational system.

A general impression is that the substance, scope and orientation of planning will receive province-wide acceptance, whereas the structures and processes will see a divergence of opinion. Implications are that the substance, scope and orientation of planning activities will have to differ markedly from current practice if

recommendations on these aspects are to be implemented. However, the structures and processes of the future may range from a very close similarity with those of today to an extreme of entirely different structures and processes. Whatever forms they may take, the structures and processes must meet the requirements to incorporate the substance, scope and orientation of planning.

Educational planning at the Department of Education was an example of innovative-oriented and short-range planning endeavor. It aimed to improve the quality of education to satisfy immediate needs, to implement new ideas, and to adjust the quantity of education according to supply and demand. There was no objective judgment as to the advantages or disadvantages of this planning mechanism. Subjectively, it was viewed as an example of inertia in education, and it persisted as long as there appeared to be no threat of survival or as long as there was no demand for change. This is not to say that the attitudes of departmental employees were against change. On the contrary, they were ready to implement change, provided there was a certain degree of caution. It was unlikely that structures and processes from outside would be adopted in this system without considerable contemplation and appropriate alterations. The fact that these officials had participated in the work of the CEP, had

attained a high level of education and had kept up with educational developments elsewhere increased the possibility of certain recommendations of the CEP being implemented. A consensus of some sort probably will be reached and a planning unit established in the Alberta educational system.

RECOMMENDATIONS FOR FURTHER RESEARCH

The preceding conclusions and implications suggest areas where further information would be desirable. Several possible research areas are as follows:

1. Reactions to the CEP recommendations. The recommendations should be identified and classified into sets of related proposals. Reactions are of two types and they may be analyzed accordingly. The first type of reaction is based on some sort of scale, such as a six-point scale (for example: very strongly agree, strongly agree, agree, disagree, strongly disagree, very strongly disagree). The second type of reaction is in the form of suggestions, conditions, advantages, and disadvantages. Analyses of these two types of reactions may indicate the likelihood of specific sets of recommendations being implemented. The result may be compared with government action or posture. This study can be done immediately.

2. Implementation of the CEP recommendations. A study on the implementation of the CEP recommendations will be similar to those by Maddock, Wilcer, and Daloise in 1970. However, data will not be available until a number of years have passed.

3. A comparative study of educational planning in Canadian provinces. Some Canadian provinces, such as Quebec, already have planning units. A comparative study of this nature can be made not only of structures and processes, but also of the characteristics of planning activities in terms of time orientation, information, and participants. The researcher would likely have to develop and use questionnaires, since the interviewing task would be too involved and too costly.

The areas of study suggested above would provide useful information for planning both in theory and in practice. At this stage in the development of educational planning, such studies should contribute to the field as part of the learning process.

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Calgary School Board, Physical Education Department.

County of Camrose, School Committee.

Civil Service Association of Alberta.

Lethbridge Council, Alberta Federation of Home and School Association.

County of Strathcona, Principals' Association.

St. Paul Regional High School District No. 1.

Three Hills School Division No. 60, Principals' Association.

APPENDIX A

CATEGORY, EXPERIENCE, AND OCCUPATION
OF CEP BOARD MEMBERS

Name	Category	Experience	Occupation
Anderson, Mr. Al	Lay	President of Students' Union (University of Alberta) Business Administration	Systems Analyst
Downey, Dr. L.W.	Education	Staff of Department of Educational Administration (U. of A.) Chairman of Department of Secondary Education (U. of A.) Chairman of Department of Educational Administration (University of British Columbia)	Director of Alberta Human Resources Research Council
Haney, Mr. Leonard	Lay	School Trustee	Businessman
Keeler, Dr. B.T.	Education	French and Social Studies Teacher Principal of Jasper Place Composite High School	Executive Secretary of the Alberta Teachers' Association

APPENDIX A

(CONTINUED)

Name	Category	Experience	Occupation
Kolesar, Dr. Henry	Education	High School Inspector Superintendent Member of Board of Post-Secondary Education Assistant Chaiman of Department of Educational Administration (U. of A.)	Chairman of Alberta Colleges Commission
O'Byrne, Honorable Mr. Justice Michael	Lay	President of Alberta Catholic School Trustees' Association Professor of Taxation and Business Law (U. of A.)	Judge of Supreme Court of Alberta
Smith, Dr. Sam	Education	Post-Secondary Education Administrator	President of the University of Lethbridge
Stein, Mr. Allen	Lay	President of the Alberta Students Organization	Student
Worth, Dr. W.H.	Education	Superintendent Chairman of Department of Elementary Education (U. of A.) Associate Dean of Planning and Development, Faculty of Education (U. of A.) Vice-President of Planning and Development (U. of A.)	Commissioner

APPENDIX B

PUBLICATIONS OF THE ALBERTA COMMISSION ON EDUCATIONAL PLANNING

B.1

PLANNING INVESTIGATION

An Examination of Cost Benefit and Cost Effectiveness Analysis in Education by Peter J. Atherton, et al.

A Review of Educational Planning: The Qualitative Approaches by Patricia Bourgette.

The Implementation of Theory in Educational Planning: A Not for Practitioners by Patricia Bourgette.

Curriculum Planning in Alberta by Stan Cowley.

An Assessment of Planning-Programming-Budgeting-Evaluating Systems in Education by William Duke, et al.

Evaluation of Instructional Programs by D.A. MacKay and T.O. Maguire.

An Overview of Planning in Education by Erwin Miklos.

A Concept of Educational Planning by Erwin Miklos and Patricia Bourgette.

A Comparative Study of Coordinating Structures for Systems of Post-Secondary Education by W.A.S. Smith.

B.2

POSITION PAPERS

A Conceptualization of Curriculum for the Seventies, With Recommendations by Robert Anderson and Janet Emig.

Aims and Objectives by Harold S. Baker.

Instruction in Higher Education by John P. Blaney and Robert L. Overing.

The Preparation of Instructional Personnel, Nursery to Grade 12, to 1999 by S.C.T. Clarke.

Educational Facilities by A.J. Diamond.

Organizing a Provincewide System of Education to Accommodate the Emerging Future by L.W. Downey.

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B.3

FUTURE STUDIES

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An Outline of the Future: Some Facts, Forecasts and Fantasies by Harold J. Dyck et al.

Social Futures: Alberta 1970-2005 by Harold J. Dyck and George J. Emery.

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B.4

SPECIFIC STUDIES

The Open University: A Report to the H.R.R.C. by F. Terentiuk.

Current and Future Problems of Alberta School Principals by N.J. Chamchuk.

Goal Perceptions and Preferences in Organizations by William A. Stewart.

Implementation of Recommendations Made by the Alberta Royal Commission on Education, 1959 by E. Miklos, D.D. Daloise, G.R. Maddocks, A. Wilcer.

Participation in Selected Institutions of Post-Secondary Education in Alberta by David Friesen and Chester S. Bumbarger.

Summary and Classification of Submissions to the Commission on Educational Planning by G.R. Maddocks.

APPENDIX C

SUMMARY OF REPORT

Chapter	Heading	Summary of Content[1]	Example of Sub-topics[2]
1	Tomorrow: Future Forecasts	Anticipation of probable social, economic and technological developments that will influence the needs of individuals and the nature of schooling in the decades ahead.	Social Forecasts Population Forecasts Economic Forecasts Technological Trends Needs of the Individuals Alternative Futures
2	A Sense of Direction	Description of ideals, principals and goals to guide our eductional responses to changing conditions.	Lifelong Learning Participatory Planning Functions of Basic Education Functions of Further Education.
3	Structure	Delineation of ways to organize, govern and coordinate our efforts to move in new directions.	Early Education Children of the Poor School Year Reorganization Governance Planning Unit Interprovincial Relations
4	Process	Elaboration of approaches to learning and teaching that will help us achieve our aspirations.	Program Operation Pupil Power Content Valuing Life Experience Leisure and Creativity Mastery Learning Voucher Systems

APPENDIX C (Continued)

SUMMARY OF REPORT

Chapter	Heading	Summary of Content[1]	Example of Sub-topics[2]
5	Planning	Explanation of means for checking and altering future courses of action.	Anticipating the Future Monitoring Operations Local Planning
6	Resources	Identification of people, places, things and dollars required to produce change and improvement.	Personnel Community Resource Persons Certification Tenure Institution-Community Integration Access Finance
7	Next Step	Indication of some immediate starting-point.	Strategy Commission Preferences A Forward Look

Source: A Choice of Futures.

[1]Quotations from the table of contents, A Choice of Futures.

[2]Sub-topics are not necessarily of the same level.

APPENDIX D

CORRESPONDENCE FORMS USED BY CABINET COMMITTEE ON EDUCATION

Dear

Mr. Hyndman, Mr. Foster and Dr. Hohol have now completed their initial discussion of your ..... concerning the report of the Commission on Educational Planning. Your submission has been most helpful and we wish .....
.....

As you know, the government has neither accepted nor rejected the report as a whole. While no position has yet been taken concerning the report's main philosophic thrusts, this committee is examining certain specific proposals for possible implementation. These proposals are now being evaluated separately by individual ministers and their departments. This evaluation will be thorough and it will include an analysis of both public and professional response to the commission's proposals.

Your ..... has special significance for .....
.....
.....
Consequently my ministers are asking senior officials in these offices to weigh your entire submission carefully in preparation for future policy discussions.

In addition, some parts of your presentation are of special interest to .....
.....
and excerpts are being sent on to them, together with comments from this committee.

While we cannot promise immediate and clear-cut government action on ....., you may be assured that your voice has been influential.

Sincerely,

CABINET COMMITTEE ON EDUCATION

TO:

RE:

A submission from the above has been received by the Cabinet Committee on Education in connection with the Worth Report.

Mr. Hyndman, Mr. Foster and Dr. Hohol have now discussed this submission and have replied to the senders. In their reply, your offices are mentioned and the following two paragraphs appear:

> "As you know, the government has neither accepted nor rejected the report as a whole. While no position has yet been taken concerning the report's main philosophic thrusts, this committee is examining certain specific proposals for possible implementation. These proposals are now being evaluated separately by individual ministers and their departments. This evaluation will be thorough and it will include an analysis of both public and professional response to the commission's proposals."
>
> "While we cannot promise immediate and clear cut action on your submission, you may be assured that your voice has been influential."

Copies (or excerpts) of this brief are therefore being sent to those branches of government which are directly concerned. We hope these submissions will play a part in your policy considerations. We have not obligated you to reply to the authors of the submission, but you may do so if you wish.

Abstracts of some 150 submissions to this committee will soon be available should you wish copies. In addition, all original submissions are available at these offices for your reference. After January 1, 1973, these files will be available from Central Registry at the Department of Education.

Larry T. Shorter
Executive Secretary

Lou Hyndman, Minister of Education
Jim Foster, Minister of Advanced Education
Dr. Bert Hohol, Minister of Manpower & Labour
Government of Alberta

Choice of Futures Project
400, 11010 - 142 Street
Edmonton, Alberta, T5N 2R1
telephone 453-3647

APPENDIX E

GLOSSARY

ASTA	Alberta School Trustees' Association
ATA	Alberta Teachers' Association
CEP	Commission on Educational Planning
HRRC	Human Resources Research Council
IPD	Integrated Provincial Development
OECD	Organization of Economic Co-operation and Development
PAB	Program Accounting and Budgeting
PERT	Program Evaluation and Review Technique
PPBES	Planning, Programming, Budgeting and Evaluation System
PPBS	Planning, Programming and Budgeting System

APPENDIX F

SAMPLE INTERVIEW GUIDES

GUIDELINES FOR INTERVIEW WITH MEMBERS OF COMMISSION BOARD

1. What was your area of expertise prior to your service in the Commission?

2. Why and how were you chosen to serve the Commission Board?

3. What did you perceive to be the structure under which the Commission performed its functions?

   Could you draw a diagram to depict this perceived structure?

4. What did you perceive to be the procedure in which the Commission carried out its planning functions?

   Could you describe some sequential steps which the Commission followed in performing its functions?

5. How did the Commission design its tasks, set its target dates, and have the tasks assigned to specific members or task forces?

6. What were your responsibilities?

   Were these responsibilities pre-determined or assigned after thorough discussions among members?

7. What procedure did noy employ in carrying out your responsibilities or assignments?

8. What types of activities were you engaged in?

9. What specific tools or techniques did you used in carrying out these activities?

10. What specific information, studies, etc. did you use or incorporate in your activities?

11. What were the time periods for the completion of these activities?

12. How many individuals or groups, or areas of specialation were required for or engaged in these activities?

GUIDELINES FOR INTERVIEW

WITH PERSONNEL OF THE ALBERTA DEPARTMENT OF EDUCATION

1. How many levels of planning activity are there in the Department? How can these planning levels be distinguished?

2. Who gets involved in formulating policies and drawing up plans at these planning levels?

3. What are the plans or projects in this Department concerned with, e.g., innovations, surveys, exploring alternatives?

4. Who generates these plans or projects and in what manner?

5. What approaches underly these plans or projects, e.g., manpower demand, social demand, etc.?

6. What are some specific tools used in carrying out these projects or plans, e.g., demographic analysis, PPBES, etc.?

7. What is the time orientation of these plans or projects.

8. What groups or individuals participate in carrying out these plans or projects?

9. What information do these plans or projects require or use as bases?

10. What are some strengths of the existing mechanisms for planning?

11. What are some shortcomings of these planning mechanisms?